

### **Notice Regarding Round One-Grant Applications**

The CCHE Grant Applications provided on this website are for informational purposes only. Because the applications were based on a different set of questions and scoring criteria than the current round, they will be of limited assistance to applicants for Round Two funding. It is very important that Round Two applicants rely **ONLY** on the criteria and process for this current round of funding in submitting applications to be considered for funding by the CCHE Board.

The Applications listed below were received by our office for funding consideration for a previous round of funding (Round One) due on November 1, 2004. Although the CCHE Board has reserved funding for 33 projects from Round One, the list only reflects those grant applicants that currently have a signed CCHE Grant Agreement with our office. Please note that some of the applications reflect programs and budgets which have been subsequently modified to accurately reflect the revised budget and tasks. For further information about the grant applicants listed below, please contact CCHE directly.

**California Cultural and Historical En  
Grant Application Face Sheet**

Applicant Name:  
(Organization or Public Agency) San Diego Natural History Museum

Applicant Address: PO Box 121390  
San Diego, CA 92112-1390

Public Contact  
Regarding this Project: Dr. Michael Hager

Public Telephone: (619) 255-0216  
Facsimile: (619) 232-0248  
Email: mhager@sdnhm.org

Non-profit Organization Federal  
Employer Identification Number: 95-1643375

---

Name of Project:  
(Short Title) Preserving and Showcasing California's Natural Heritage

Project Amount:  
(Total Amount of Project) \$12,597,750

Amount you are Requesting from  
CCHE: \$4,000,000

Project Location:  
(indicate exact address,  
City and County) 1788 El Prado  
San Diego, CA 92101

Anticipated Project Start Date: June 1, 2004  
(if you have already initiated your project, indicate that date)

Anticipated Completion Date: December 2006

Location Latitude and Longitude: 32° 43' 55" north latitude; 117° 08' 47" west longitude

Website Address (if applicable): www.sdnhm.org

**Part One – CCHE Face Sheet**

**Brief Project Description: (please use space provided below)**

Everyday, irreplaceable scientific specimens of California's natural heritage are being destroyed as an unintended consequence of land development. The San Diego Natural History Museum has responded to this ongoing threat by creating a paleontology recovery program to save these fossils, which are an integral part of the California story because they literally chronicle the formation of this state. Sadly, most Californians remain unaware of this incredible prehistoric legacy as many of these fossils have never been brought to public view. Our visitor research also reveals that residents generally have a very poor understanding of the climatic and tectonic forces that have shaped their homeland.

To remedy this situation, the San Diego Natural History Museum has raised \$8,597,750 to interpret for the public the comprehensive story of California's geologic past. In a state known worldwide for its unique geologic, paleontologic, seismic, and plate tectonics history, it is inconceivable that no such comprehensive exhibition currently exists. Four million dollars of CCHE funding will provide the public with access to these fossil treasures, along with a full spectrum of education and outreach programming to further strengthen the fossils' educational value. In turn, within two years CCHE will be able to show voters that their investment in California's cultural heritage was leveraged quickly and exponentially to create a lasting public benefit.

Our project includes the fabrication and installation of permanent exhibition capital components that will serve the public for at least the next 20 years. During that time ten million visitors will experience this exhibition in our Balboa Park facility, with 1.3 million of those visitors receiving free admission to maximize public access to these treasures. Additional outreach will include website development which will showcase California's fossil heritage to more than 20 million people around the world; creation and distribution of instructional resources, teacher training, and distance learning programs that will benefit for more than 16,000 classrooms and 500,000 students annually; and outreach to underserved communities to provide new audiences with access to experiencing the joys of California's cultural heritage.

Input from California residents has been a fundamental part of this project's planning. Residents further attested to the project's value through the \$40 million in contributions they made to fund the facility expansion needed to house a project of this scope. In anticipation of Proposition 40 funding the Museum has conducted extensive fundraising to secure (all in cash) the necessary 1:1 match, which is ready for placement into an escrow account upon awarding of this grant. Due to the rising cost of exhibition fabrication, we face a 10% cost increase for every six months of delay in project implementation, so it is essential that the capital aspects of the project be started immediately. We respectfully ask CCHE to become a partner in this wonderful opportunity to give California residents a permanent legacy of their state's natural heritage.

**CCHE Use Only:**

Department Reference No: \_\_\_\_\_

Bond: \_\_\_\_\_

Budget Year: \_\_\_\_\_

Award Date: \_\_\_\_\_

Type of Award: \_\_\_\_\_

Project Type: \_\_\_\_\_

**Acknowledgment**

The CCHE grant applicant signing below declares the following:

The applicant understands that by submitting this CCHE Grant Application, the he/she is indicating that the information submitted therein is true and accurate to the best of their ability and that the applicant waives any and all rights to privacy and confidentiality of the material submitted.

The applicant also understands that if any part of the information in the CCHE Grant Application is found incorrect, inaccurate or if there is a change in the information provided in the CCHE Grant Application after it is submitted, that this information will be made known to the CCHE in writing as soon as possible.

Signed:

Date:

Michael W. Hager

9/30/04

Print Name: MICHAEL W. HAGER

Title: EXECUTIVE DIRECTOR

**Part One – CCHE Face Sheet**



## Part One – Checklist and Acknowledgment Form

### Page One of Two

#### Checklist and Acknowledgment Form

**NOTE: A SIGNED COPY OF THIS FORM MUST BE INCLUDED WITH YOUR CCHE GRANT APPLICATION. AFTER YOU HAVE DETERMINED THAT YOU HAVE INCLUDED ALL OF THE INFORMATION LISTED ON THIS CHECKLIST, PLEASE DOUBLE CHECK THE INFORMATION BY INITIALING AFTER EACH ITEM REQUESTED, SIGN AND DATE IT.**

Item

Initial

PART ONE OF CCHE GRANT APPLICATION CONSISTING OF:

1. CCHE Face Sheet (2 pages)

i + ii EC

2. Checklist and Acknowledgement Form (2 pages)

iii + iv EC

PART TWO OF CCHE GRANT APPLICATION CONSISTING OF:

Answers to Questions One-Six

(each question must follow page/space allocation)

Question 1: Project Description and Project Goals

1-2 EC

Question 2: Project Audience and Needs Assessment

3-4 EC

Question 3: CCHE Priorities

5-6 EC

Question 4: Project Maintenance and Public Accessibility

7-10 EC

Question 5: Tasks, Budget and Matching Requirements

11-20 EC

Question 6: Project Team and Supporting Documents

21-36 EC

PART THREE OF CCHE GRANT APPLICATION CONSISTING OF:

Attachments to the CCHE Grant Application

Attachment 1: Visual Description of Proposed Project

37-46 EC

Attachment 2: IRS Determination Letter\*

✓ EC

Attachment 3: Non-Profit Organization by-laws\*

✓ EC

Attachment 4: Non-Profit Organization Articles of Incorporation\*

✓ EC

Attachment 5: IRS Form 990 or 990EZ or 1023\*

✓ EC

Attachment 6: Non-Profit Organization's Board of Directors, staff and volunteers\*

✓ EC

Attachment 7: Copy of Resolution

✓ EC

(\*non-profit organizations only)

## Part One – Checklist and Acknowledgment Form

**Question #1: Please state the benefit and contribution your project will have toward the overall goal of enhancing the threads of California culture and history, and how your project goals will achieve this.**

Irreplaceable scientific specimens of California's natural heritage are being destroyed everyday as an unintended consequence of land development. This problem has become especially acute with the surge in new construction throughout the state. Although essential to California's economic prosperity, development has the unfortunate side effect of destroying ancient and irreplaceable fossil specimens vital to achieving a thorough knowledge of past life forms and geologic processes. Perhaps even more significant is that the destruction of these fossils reduces the availability of baseline data needed to better understand how present-day biological diversity has originated and changed over time. This loss of our state's natural treasures ultimately impacts California's ability to develop effective, data-driven natural resources policies, and hinders its citizens' development of a sense of "unique place" and pride that Assembly Bill 716 envisions.

The San Diego Natural History Museum (SDNHM) has responded to this ongoing threat to California's natural heritage and knowledge base by creating a paleontology recovery program to save fossils from destruction. In collaboration with the building industry and the California Department of Transportation, Museum scientists work at construction sites throughout Riverside, Imperial, Orange, and San Diego counties to collect fossils unearthed during the grading process. To date we have recovered over two million specimens, many new to science. They have made southern California renowned worldwide.



*SDNHM scientists salvaging fossils at a southern California construction site*

To preserve these magnificent specimens of California's natural heritage (many found nowhere else in the world), and to provide the public with access to and understanding of them, SDNHM has undertaken a \$12.5 million project to house and display these priceless treasures. Our *Preserving and Showcasing California's Natural Heritage* project will achieve the following goals:

1. Create permanent core exhibitions that preserve and showcase some of California's most important ancient fossil specimens and chronicle the prehistoric development of the state's remarkable natural heritage.
2. Educate of state residents about California's natural heritage by:
  - a) Attracting a minimum of ten million visitors to the exhibition over a twenty year period;
  - b) Engaging more than twenty million unique website visitors around the world through online access to the exhibition's web-based educational materials, activities, and curriculum;
  - c) Creating an innovative model for complementary educational programming that supports and enriches California Department of Education content standards, a model for other states to replicate.
3. Enhance public understanding of the complete, untold story of southern California's geologic formation and its relevance to present day biological diversity and environmental issues (e.g. land use planning and water availability), thereby inspiring visitors to appreciate and protect California's existing natural resources.

### **Project Description**

Southern California and the adjacent Baja California peninsula form a geologically unique region known as Peninsular California. This region is literally being torn away from the rest of North America along a great system of transform faults and crustal spreading centers which includes the infamous San Andreas Fault Zone. There are few places around the world where such large-scale features occur on dry land, and yet public understanding of these complex geological conditions and processes is limited. The same can be said about public understanding of the rich biodiversity of Peninsular California, which is directly correlated with our diverse regional geology. Keeping in mind that the present is merely a snapshot in an ongoing process of changing conditions, it is critical to understand where we have come from so that we can better appreciate and

San Diego Natural History Museum  
*Preserving and Showcasing California's Natural Heritage Project*

prepare for what may occur in the future. The general lack of public understanding about this wondrous geologic history presents an extraordinary opportunity to educate Californians about the formation of their state and the subsequent evolution of life in this region, a story unlike any other on Earth. **In a state that is known worldwide for its unique geologic, paleontologic, seismic, and plate tectonics history, it is inconceivable that there is currently no comprehensive exhibition interpreting California's prehistoric heritage for the public. CCHE funding of this project will correct that by December 2006!**

**Project Elements:** Since 1874 the San Diego Natural History Museum has been actively involved in the research (through collection and study of specimens), preservation (through care and storage of specimens), and interpretation (through exhibitions, education programs, and published research studies) of the natural history of Peninsular California. Our *Preserving and Showcasing California's Natural Heritage* project will help the general public understand the geological and biological history of their homeland. The exhibition will utilize actual fossil and geologic specimens collected by SDNHM paleontologists and geologists from California sites, along with full-sized, permanently installed animal fabrications, to tell the story of the biological and environmental changes that have occurred here over the prehistoric past as well as the geologic events of the present.

The fossil menagerie will include Cretaceous dinosaurs, Eocene rhinoceros-like brontotheres, Oligocene camels, Miocene sharks, Pliocene baleen whales, and Pleistocene ground sloths and mammoths. These long-extinct organisms lived in a variety of ancient southern California environments, ranging from shallow tropical sea floors to arid floodplains, from humid coastal forests and mangrove swamps to temperate rocky intertidal shorelines. The exhibitions will also include interactive displays on the origin of the Gulf of California and the evolving San Andreas Fault Zone. **When the project is completed in 2006, the San Diego Natural History Museum will house the only exhibition in California that gives a comprehensive overview of the unique paleontological and geological history of this region.**

**Project Budget and Cash Match:** The total cost of this ambitious project is \$12,597,750. **Through generous and broad-based community support and a prestigious \$2 million grant award from the National Science Foundation, SDNHM has already raised two-thirds of this amount.** This covers the cost of building renovation and construction, exhibition planning and design, exhibition content development, creation of a complementary K-12 curriculum correlated to California Department of Education science standards, website development to provide interactive access and worldwide exposure to information about California's natural heritage, and project evaluation and remediation. We respectfully request a \$4 million grant from the California Cultural and Historical Endowment to provide the remaining funding needed to complete this ambitious project, specifically the cost of constructing the exhibition's capital assets (physical property that will be in place for at least the next 20 years.)

**This project significantly enhances California's culture by:**

- Preserving irreplaceable scientific specimens that document the unique origins of California's geologic formation and biological diversity.
- Educating residents about the natural heritage of their state, helping them to become informed stewards who understand California's natural resource policy issues and take pride in their unique heritage.
- Providing the last \$4 million needed to complete a \$12.5 million project, which the San Diego Natural History Museum will further leverage through the sustained operation of scientific research and environmental education programs over the next 20 years, benefiting more than ten million on-site visitors and twenty million website visitors.
- Showcasing California as a leader in the field of education and lifelong learning. Already our project planning has been cited by reviewers from the National Science Foundation as a model that other informal science education providers (e.g., museums, nature centers, zoos,) around the country can use to create effective, innovative learning strategies (i.e., multi-sensory, intergenerational) to support and strengthen their own states' education initiatives.

**Question #2: Please describe your project audience and how they will be informed of this project. Illustrate the critical needs this project will fulfill.**

**Project Need**

The San Diego Natural History Museum's permanent exhibitions were decommissioned in 2000 when its Balboa Park facility underwent a major renovation and expansion. Completed in 2003, this expansion was made possible by a \$40 million capital campaign to renovate the Museum's existing 60,000 square feet (built in 1933) and add 90,000 square feet of new space, providing the necessary infrastructure for expanded exhibitions, collections, and programming capacity. Through widespread community support from individuals, foundations, and corporations the Museum achieved its ambitious fundraising goal, securing all the money needed to fund building construction and implement new research and education programs. It is now poised to implement the exhibitions phase of the project, the development of new core permanent exhibitions that will benefit California residents for at least the next two and a half decades.

**Identifying and Addressing Community Needs:** As SDNHM developed its ten-year strategic plan for 2002-2012, it conducted extensive visitor research and focus group discussions to solicit input on how its newly expanded infrastructure and programming capacity could best serve the community. These groups included professional educators, leaders from underrepresented communities, youth and teens, senior citizens, and audiences with special needs. One of the primary desires these constituents expressed was for the Museum to expand its capacity to provide lifelong education about the natural world through high quality exhibitions and programs, making them available onsite, offsite, and online.



*Del Museo al Barrio students*

SDNHM has already dedicated itself to reaching underserved communities by providing high quality, culturally appropriate science education outreach programs. These programs serve more than 2000 children each year, primarily from inner city Title I schools. For example, our *Del Museo al Barrio* program ("From the Museum to the Neighborhood") offers children in the primarily Latino neighborhood of Sherman Heights weekly afterschool instruction in Spanish and English that uses hands-on science activities to support California Department of Education standards in life and earth sciences. The program culminates with a trip to the Museum with their families, encouraging non-traditional audiences to feel welcome in the Museum.

Another example of our outreach is the Museum's "School in the Park" program, which brings 4<sup>th</sup> and 5<sup>th</sup> grade students from Rosa Parks Elementary School (a multiethnic, inner city school) to the Museum for immersive learning about life and earth sciences. The Museum has also earned praise for its leadership in providing high quality afterschool programming. Its Afterschool Science Adventures program, funded by the James Irvine Foundation, created exemplary instructional materials to support teachers' classroom instruction. The curriculum also emphasized the development of critical thinking skills, using the environment as an integrating context to strengthen math, science, and literature competencies.

With this strong track record of informal education programming and outreach, the Museum's new strategic plan focuses on supporting formal educators in their efforts to increase student achievement and meeting of grade level standards. **In standardized science testing of fourth grade students in 2002, California scored lower than every state except the territories of Guam, the Virgin Islands, and American Samoa (U.S.**

Department of Education, National Center for Education Statistics, *The Nation's Report Card 2000*, Washington, D.C.)

Further documenting this need for improved science instruction, a survey of 104 elementary school teachers conducted by the San Diego County Office of Education in 1998 indicated that 72% of teachers surveyed strongly agreed that teaching science is important, but 54% of them reported teaching two hours or less of science per week, and 66% reported 15 hours or less of staff development in this subject over the past five years. These teachers also identified specific support they need to improve instruction: someone knowledgeable about science to help them in the classroom (75%), training on integrating science with reading, writing, and math (79%), how to use science to teach critical thinking skills (93%), and how to use the Internet to support good science teaching (95%.) SDNHM has taken this feedback to heart in designing this new core exhibition, incorporating input from teachers at all grade levels, and from public, private, and home schools, into the schematic design of the exhibition and its complementary educational materials and programming.

**Target Audience:** The extensive planning SDNHM did for this project also included research to help us better understand our diverse audiences and their needs. 2001 admissions data indicate our visitors' age breakdowns are approximately 52% adult, 39% children, and 9% seniors. Of children coming to the Museum, 54% come in school groups, and the remainder come with their families. Zip code analysis of visitor responses reveals that 63% are from southern California, 15% are from other cities, and 22% are from out of state, including Mexico. Ethnic self-identification responses show that 72.8% of non-school visitors are white (vs. 67% of the county population, 2001 census), 13% are Latino (vs. 27% of the population), 7% as Asian (vs. 9% of the population), and 1.9% African-American (vs. 6% of the population.) Native Americans (1.9%) exceeded the percentage of the county population (1%.) A surprising finding of our research was that 25% of visitors surveyed said they spoke a language besides English in their home. Of those multilingual respondents, 50.5% spoke Spanish.

**Based on this visitor research, SDNHM's 2002- 2012 strategic plan identifies two key audiences for this project to target. The first is families with children,** since one-half of children who visit the Museum come with their families. Exhibitions will employ a playful, interactive approach to learning and be designed for multiple simultaneous users. Labels will stimulate conversation, encouraging dialogue among family members and the promotion of intergenerational learning. Exhibit elements will be scaled or adjustable for users of differing heights.



*San Andreas Fault system visible from space*

**Our other target audience is the Latino community.** Because Peninsular California includes both Mexico and the United States our mission mandates outreach to all residents of this region. Additionally, we plan to increase Latino visitorship to the same level Latinos are represented in the general population. Our project will accomplish this by employing culturally and linguistically appropriate marketing to engage the Latino community, and developing bilingual signage and audiovisual narrations in consultation with Mexican educator Dolores Monterrubio. We will also recruit bilingual volunteers to serve as exhibit docents, providing equal access to the exhibitions' content for both our Spanish and English speaking visitors. Section 4 discusses in greater detail how we will inform our target audiences about this project.

**Critical Needs Addressed by This Project:** SDNHM's *Preserving and Showcasing California's Natural Heritage* project effectively addresses the following critical state needs:

- Preserving irreplaceable specimens of California's geologic and fossil history;
- Providing the high quality instructional resources and training that teachers have stated are essential to improve California students' academic achievement in science.
- Increasing the diversity of California's museum visitors by engaging nontraditional and underserved audiences through culturally appropriate outreach and programming.



**Question #3: How does this project fit into the priorities of CCHE?**

The San Diego Natural History Museum's *Preserving and Showcasing California's Natural Heritage* project significantly advances the following priorities of the California Cultural and Historical Endowment Act:

**It preserves, interprets, and enhances understanding and appreciation of a crucial element of California's story that adds to the state's cultural, social, and economic evolution:** Our project preserves and showcases 600 million years of California history, a history that has laid the foundation for California's subsequent economic, social, and cultural development. CCHE funding will provide state residents with access to magnificent fossil specimens they will not otherwise be able to experience without this project. As AB 716 states, "Artifacts that embody California's past are in escalating danger of being redeveloped, remodeled, paved, excavated, bulldozed, modernized, and lost forever." The Museum is countering this trend through its paleontological recovery operations discussed on page one. Our new core permanent exhibitions will educate developers and the public about fossils of this region, and teach developers what to look for as they excavate. Furthermore, presenting and interpreting California's geologic history will help residents understand how the state's natural heritage influenced the formation of other aspects of California's economic and cultural development (e.g., the establishment of cities because of their proximity to water, mineral deposits, and other natural resources; development patterns determined by their topography and geological attributes, etc.)

**This project also adds to the state's cultural, social, and economic evolution by strengthening California's binational relations with Mexico.** The California/Mexico border is one of the busiest ports of entry in the world. Trade between these two regions has been crucial for their economic growth and prosperity. Just as Peninsular California's geologic formation is a unifying link between the two regions' biological diversity, their shared natural resources (e.g. the Tijuana River watershed and the Colorado River) provide common ground for partnerships on current environmental issues that affect both. The Museum has taken a leadership role in strengthening environmentally-related binational relations with Mexico. SDNHM's research director, Dr. Exequiel Ezcurra, is currently on leave of absence to serve as director of Mexico's National Institute of Ecology at the request of President Vicente Fox.



Dr. Ezcurra remains a member of the Museum's Binational Advisory Board that guides joint conservation initiatives in which the Museum participates.

*Binational expedition to Baja California  
November 2003*

Other binational projects we've spearheaded include research expeditions conducted with Mexican universities like Universidad Autonoma de Baja California to document the region's biological diversity, and the award-winning film *Ocean Oasis*, produced by the Museum in conjunction with PRONATURA A.C., Mexico's leading environmental nonprofit. SDNHM's new permanent exhibitions will similarly support improved binational relations by displaying fossil finds from southern California and Baja California, helping visitors understand the geologic origins and natural resource issues common to both southern California and Baja California, Mexico.

**Presenting absent or underrepresented threads of California's story:** Because there is currently no exhibition anywhere in the state that comprehensively explains the formation of Peninsular California, its complete paleontologic, geologic, and seismic story remains untold. The peninsula's separation from what is now the Mexican mainland, and its subsequent northward drift 300 miles along the San Andreas Fault over the past six million years, is not told in any California museum. Now that this region is inhabited by more than 10 million residents and home to some of the world's most threatened and endangered species, this story is perhaps one of the most important geological events in the world, and therefore deserves to be told in a more complete, systematic manner than is found in the few locally-focused exhibits that currently interpret only

isolated pieces. SDNHM's project will also develop a comprehensive K-12 curriculum to educate students about this geologic history in several grade levels, thereby supporting California's earth science standards. These standards are a required part of all school curricula, yet there are few California-focused resources available to support formal education in this area.

**Dr. Tanya Atwater** (elected member of the National Academy of Sciences, Professor of Tectonics at the University of California Santa Barbara, and one of the originators of plate tectonics theory) states "I am particularly pleased that the plate tectonic history of California and the San Andreas Fault will be included and integrated into (SDNHM's exhibition) . . . I don't know of any place where it (the San Andreas Fault story) is comprehensively tied together and integrated into the larger history of our planet and lifeforms. **Your exhibition will be a wonderful vehicle for helping the citizens of California understand the special role of tectonics in forming the dramatic landscapes and natural challenges of our unique state.**" In particular, the exhibition will provide visitors with the interactive experience of re-creating the seismic formation and separation of Peninsular California. The OmniGlobe component directly supports AB 716's call for "projects that preserve, display, demonstrate, or interpret California's geologic and oceanographic history, including but not limited to, its assemblage from Jurassic and earlier archipelagos and ophiolitic remnants through subduction processes and the expression of global tectonic forces in its mountains, basins, and faults."

**Lack of public attention and funding to a particular cultural theme:** The state of California provides dedicated annual funding sources for arts, humanities, and historic preservation organizations. However, there are no such sources of state support for natural history museums. **Proposition 40 funds are virtually the only means the state of California has to provide funding for natural history museums.** SDNHM's audience research clearly indicates the community values the contributions our Museum makes to California's cultural and educational climate. The public has attested to this value with their \$40 million in gifts made to our recently completed capital campaign, plus the \$4 million raised as the cash match for this project. We now ask the CCHE to validate the importance of the community's investment by providing the remaining \$4 million in funding needed to complete the capital components of our new core exhibitions project.

**Vision of AB 716 Author:** At the August 11, 2004 meeting of the California Cultural and Historical Endowment, State Assembly Member Marco Firebaugh discussed his vision for projects selected for funding by CCHE: that they "best express who we are as Californians, and what we hope to be; that they provide a new way of examining our state and serving as national models, shining examples of California's best expression." SDNHM's project accomplishes all of these lofty ideals by strengthening one of its most important assets, its human resources capacity, in three important ways:

- Creating a science-literate future workforce that receives the high quality education needed to become 21<sup>st</sup> century pioneers in the fields of medicine, engineering, and life, earth, and physical sciences;
- Developing critical thinkers and lifelong learners who can provide innovative leadership and effective problem solving / policymaking for the state over the next century; and
- Strengthening stewardship of California's natural resources by fostering appreciation and caretaking of California's remarkable natural heritage, thereby ensuring that California's natural heritage survives to be passed intact to future generations.

#### **Comments from National Science Foundation Reviewers about our Project**

- "The evaluation and planning approaches are models. It is to be hoped that they are widely emulated."
- "The front end research is an excellent indicator of the museum's commitment to outreach and inclusion."
- "There is consistent orientation towards the visitor. . . extraordinary thoughtfulness regarding access to those with visual, auditory, or physical limitations. The program is . . . innovative with its respect to underserved populations."

**Question #4: What is your plan for financially maintaining and sustaining your project after CCHE funds are exhausted? What is your plan for making your completed project accessible to the public?**

The San Diego Natural History Museum, founded in 1874, has a 130 year track record of successful operations. The financial stability of the Museum is due largely due to the diversification of its revenue sources, which for the year ended June 30, 2004 include admissions and membership (8% of income), research grants and contracts (8%), fundraising (54%, which includes the \$4 million we raised as the cash match for this project), Museum store (7%), government grants and contracts (11%), education programs (4%), and investment income (8%). More than 5,500 households are Museum members, and we enjoy one of the highest membership retention rates of any California museum (67.5%). SDNHM also has a modest \$4 million endowment which helps support its scientific research and library, collections curation, and education programs. Over the next twenty years we anticipate a \$10 million growth in this endowment through the maturation of planned gifts.

This diversified funding base provides the strong financial foundation needed to operate and maintain SDNHM's new core permanent exhibitions. We have conducted a detailed analysis to assess and plan for the increased operational costs this project will entail, which total approximately \$330,000. These new expenses will include added staff for admissions and security, building maintenance, education and outreach, exhibition maintenance, and marketing; advertising expenses (television, radio, and print ads); printed and consumable education materials; and utilities. Our projections also indicate an expected 15% increase in visitorship which will generate approximately \$360,000 in new admissions revenue annually, enough to sustain the project. Increased facility usage revenue is also expected due to the renewed interest this project will generate from event planners, corporate meeting planners, and conventions.

**Ongoing Promotion, Operation, and Maintenance**

SDNHM is committed to providing any and all resources necessary to ensure the successful operation of the exhibition. Our long range operational plan includes:

**Marketing and Outreach:** SDNHM will develop a detailed marketing plan to publicize the opening and ongoing operation of the new exhibition to a broad spectrum of audiences. Methods will include T.V., radio, and newspaper ads (in both Spanish and English), press releases, and e-mail newsletters. We will also conduct targeted marketing, such as inviting teachers and college professors to preview the exhibition so they can encourage their students to attend; ads and articles in small neighborhood publications, and distribution of coupons for discounted admission, which was one of the key requests from our focus group discussions with community leaders of underserved neighborhoods. The Museum will also offer the public 14 days of free admission annually to ensure accessibility for all audiences and eliminate economic barriers to exhibition attendance. **The California Cultural and Historical Endowment will be recognized on all exhibition-related print advertising and educational materials, permanent signage in the gallery space, on the donor wall in the atrium, and on the title page of the exhibition web pages.**

**Maintaining Audience Interest:** SDNHM will generate continued interest and enthusiasm for the project in several ways:

- **Incorporating the exhibition into the school experience of 500,000 San Diego County K-12 students.** Dr. Rudy Castruita, Superintendent of the San Diego County Office of Education (SDCOE) is a member of the Museum's board of trustees. He has pledged to include the Museum's new exhibitions and education materials into SDCOE programming (discussed on next page.)
- **Regular Updating of Exhibition Components:** This project has been designed so that the non-capital portions of the exhibition (approximately 40% of the project) can be removed and replaced with updated specimens and exhibits, continually keeping it fresh and interesting to audiences. The most notable example is the ongoing incorporation of new fossil finds by our paleontology department into the exhibition as they are discovered. We will publicize these new additions with press releases and live television news broadcasts.



- **Website Updates and Electronic Marketing:** SDNHM will regularly update its award-winning website, [www.sdnhm.org](http://www.sdnhm.org), with new exhibition-related content and interactive activity pages. We will also expand our electronic outreach by capturing visitor e-mail addresses for inclusion in our electronic newsletters about upcoming classes, programs, and traveling exhibitions.

**Project Timeline and Maintenance:** Section 5 provides a detailed description and timeline of all project activities to be conducted. An essential element of the ongoing success of the project is exhibition maintenance. A maintenance manual will be created for each exhibition component as part of the design and fabrication process, and staff will be trained by the fabricators on maintenance techniques. Based on the specifications of these manuals, the exhibits department will develop an annual maintenance plan to keep the new core permanent exhibitions in good working order at all times, thereby ensuring their ongoing availability to the public. This plan will include a list of all preventive maintenance to be done, a timeline for which components will be serviced each month, and a budget for carrying out this plan. This budget will be incorporated in the Museum's general operating budget to ensure that the necessary resources are dedicated to this important task.

**Project Personnel:** Section 6 provides biographies for each principal team member. Below is an overview of departments and principal staff members responsible for the implementation of the project:

- **Exhibits:** The exhibits department is responsible for the planning, design, content development, fabrication, installation, evaluation, and remediation components of this project. Principal staff members include Tim Murray, Director of Exhibits; Nancy Owens-Renner, Exhibit Developer; Michael Field, Exhibit Designer; and Jim Melli, Artist/Designer. The department is also augmented by support staff members who assist with exhibition installation, maintenance, and operation of audiovisual equipment.
- **Education:** The education department will be responsible for creation of the K-12 curriculum, teachers resource guide, teaching trunks, scheduling of programming both offsite and onsite, operation of outreach programs, and development of education-related web content for this project. Jim Stone, Deputy Director of Public Programs, leads this staff of eight team members.
- **Research:** The Museum's research scientists, led by Dr. Thomas Démeré will ensure scientific accuracy of exhibition content, prepare specimens, and serve as curators for the exhibition. Dr. Paisley Cato will serve as liaison between the exhibition and the Museum's collections. Dr. Tanya Atwater (U.C.S.B.) will help develop, program, and copy edit the plate tectonic components of the exhibition. Dr. Pat Abbott (SDSU) will help develop the geologic and seismic portions of the exhibition.
- **Marketing:** Under the leadership of Delle Willett, this department of three will publicize the opening of the exhibition, market it along with its complementary education programs to the general public and target audiences, and oversee admissions operations.
- **Administration:** Ultimately responsible for the successful implementation of this project is SDNHM's Executive Director, Dr. Michael Hager, who will ensure effective and diverse leadership at the board level and serve as chief spokesperson for this project. He will be supported by the following divisions and staff members' efforts:
  - Fundraising (led by Elizabeth Schiff, Deputy Director of Institutional Development);
  - Operations and fiscal oversight (overseen by George Brooks-Gonyer, Chief Operating Officer); and
  - Website development and hosting (Debbie Walden, Website Manager.)
- **Volunteers:** SDNHM has the devoted support of 793 volunteers who assist the Museum with its education, outreach, research, exhibitions, and marketing activities. Last year these volunteers worked 39,538 hours, the equivalent of 19 full time employees which would have cost the Museum \$475,000 had they been salaried. Janet Morris, Director of Volunteer Services, will conduct recruiting and scheduling of volunteers to serve as exhibition and outreach docents.

### **Ensuring Public Accessibility**

To involve the community in its project planning, SDNHM conducted extensive focus group research from constituents representing a variety of target audiences. These include professional educators, parents of special needs children, leaders of underserved communities, conservation professionals, Latino, Asian, and African Americans, and marketing professionals. Some of the major findings from each group we have incorporated into our project include:

- Creating an atmosphere where families can have fun together and learn at the same time. Representatives from the **Latino, Asian, and African American forum** said they preferred museums that offer positive experiences for their children, especially those with hands-on, experiential exhibits.
- **Educators** expressed interest in distance learning and teacher training programs to help them strengthen their instruction in earth and life sciences. Participants strongly felt that the Museum had the expertise needed to provide high quality programming, so the key to engaging teachers is to make the programs exciting and relevant to their specific instructional courses which vary by grade level and subject taught.
- A central theme expressed by **leaders of underserved communities** was that the Museum should help visitors make connections with things that are relevant to their neighborhoods. They noted that children responded enthusiastically when docents did presentations at their schools with specimens of fossils and animals from their own communities. They also suggested that the Museum find ways to reduce economic barriers to attendance, such as discount coupons and free admission.
- **Conservation professionals** cited the Museum as an excellent information resource, and said we could expand our effectiveness even more by encouraging people to act on what they've learned.

This project was also significantly influenced by the findings of the formative evaluation conducted as part of the planning process by the Institute for Learning Innovation. Their research gauged visitor interest and baseline knowledge and tested potential exhibition themes and delivery mechanisms. Some of their key findings were that people respond best to exhibitions when they felt a sense of familiarity with both the topic and style. They also found that the use of original, genuine objects and specimens was extremely effective because it creates both credibility with the visitor and curiosity to learn more. Finally, their research studies indicated that learning in an informal education setting like the Museum plays a critical role in the acquisition and development of life skills such as creativity and imagination, self-directed learning, and critical thinking; SDNHM will therefore format its exhibitions to encourage the development of these skills.

With the data learned from the above audience research, and to fulfill CCHE's vision of encouraging "all Californians to participate in and take the opportunity to actively and consciously discover and appreciate California's rich, diverse, and ever changing culture and history", our project will incorporate the following programming and outreach:

**Onsite K-12 Programming:** SDNHM will develop a *Teachers' Resource Guide* and earth science video related directly to this exhibition. These resources will be broadcast on SDCOE's Instructional Television (ITV) station which reaches 800,000 households, and be made available to all county K-12 students, with an emphasis on 4<sup>th</sup>, 5<sup>th</sup>, and 7<sup>th</sup> grades (see next page.) We will also conduct outreach to schools via the County Office of Education, electronic newsletters, and other means to familiarize teachers with our onsite programming and how they can use it to support their instructional objectives since all materials are correlated by grade level to California Department of Education Standards (detailed in chart on page 46.) Available onsite programs include self-guided tours of the Museum, docent-led tours, and classes with hands-on activities about earth and life science topics.



*Students enjoying hands-on learning at the Museum*

**Outreach Programs:** SDNHM will incorporate the exhibition curriculum into our existing *Del Museo al Barrio* and "School in the Park" programs, which will benefit more than 16,000 children over the next 20 years. We will also operate:

- **Docent outreach programming**, where volunteers take Museum programs and specimens to school sites;
- **Nature to You lending library**, where teachers, parents, and home school instructors can check out fossil and animal specimens for their students to use in the classroom;
- **Web-based activities** that provide free access to high quality educational resources to engage students during school, and serve as a valuable homework resource after school; and
- **Nature Walks**, docent-led walks in neighborhood canyons and parks so children can explore and experience the geology and biological diversity of their neighborhoods.

**Distance Learning:** The San Diego County Office of Education (SDCOE) has pledged to broadcast Museum programs (productions about the geologic history of California, paleontology and fossil excavation, plants and animals of California, etc.) via its Joe Rindone Regional Technology Center, which reaches 90% of San Diego County schools. This will provide 500,000 students annually with access to project-related educational programming. We will focus especially on serving 120,000 4<sup>th</sup>, 5<sup>th</sup>, and 7<sup>th</sup> grade students annually to help them achieve grade-level competency in their required life and earth sciences standards. Furthermore, the general public will also benefit from this partnership through Museum productions that will be broadcast on SDCOE's community access television station ITV to 800,000 households.

**Free Access for Underserved Schools:** With the assistance of the city and county school systems the Museum has targeted 30 Title I schools throughout the county who would especially benefit from the Museum's new educational programming and exhibitions. The Museum annually raises \$50,000 to secure sponsorships for these schools through our *Natural Partners* corporate membership program, which provides schools with limited resources the means to incorporate museum learning into their instruction at no cost to them.

**"Free Tuesdays" Admission:** The Museum is open 363 days a year from 10:00 a.m to 5:00 p.m., with a normal admission charge of \$9 for adults and \$6 for children. As stated previously, part of our marketing to engage diverse and underserved audiences calls for the distribution of "2 for 1" discount coupons. To further ensure that all audiences have access to the Museum regardless of economic circumstances, SDNHM offers free admission to all visitors on the first Tuesday of each month. We also invite the public to visit the Museum at no charge for two nights each December as part of the "Balboa Park December Nights" program.

The San Diego Natural History Museum's project meets funding criteria set by the California Cultural and Historical Endowment. We therefore respectfully request funding to:

- Provide for the preservation of, and public access to, irreplaceable specimens documenting California's magnificent natural heritage.
- Build upon a previous \$40 million investment by the community, with the 1:1 cash match already secured for project implementation. .
- Design, fabricate, and install the capital components of this project that have a minimum 20 year lifespan.
- Leverage this one-time state support through sustained operation of education and outreach programming that will engage a diverse audience of more than thirty million people over the project period.

The successful implementation of this project by December 2006 will also tangibly demonstrate to California taxpayers the benefits of investing in cultural projects, thus setting the stage for passage of future bond initiatives to strengthen California's cultural and historical heritage.

**"It is left to the natural environment . . . to give a unique sense of place to our communities."**

**- AB 716**

Question #5, Part I: What are the tasks of your project and your total project budget?

Task Description	Task Budget	Funding Sources	CCHE Funding	Matching Funds	Deliverables
1. Building Expansion and Renovation (to house new permanent core exhibitions)	\$3,468,750 (\$187.50/square feet construction cost x 18,500 square feet)	- \$750,000 from Clark Family - \$1,718,750 from individual, private foundation, and corporate gifts - \$1,000,000 from City of San Diego	0	Not counted toward match. Funds have already been raised and expended.	a) 8,500 square feet of gallery space b) 10,000 square feet of atrium space
<b>Activity</b>		<b>Timeline</b>	<b>Deliverables</b>		
a) Select and contract with architect.		Completed		Contract with Bundy and Thompson architectural firm.	
b) Plan and design facility expansion and renovation.		Completed		Building blueprints and renderings. *	
c) Secure needed construction permits from City of San Diego and certify compliance with CEQA.		Completed		All needed permits secured. CEQA compliance certified.	
d) Plan and implement \$40 million capital campaign to raise needed funding.		Completed		\$40,000,000 raised for building renovation and construction.	
e) Solicit bids and contract with construction firm. Complete expansion and renovation construction.		Completed		60,000 square feet of existing space renovated. 90,000 square feet of new facility space constructed.	
f) Schedule and conduct inspections needed to open building.		Completed		Passed inspections from City planning, parks and recreation, and fire marshal. Construction and renovation completed June 2003.	

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.

Question #5, Part I: What are the tasks of your project and your total project budget?

Task Description	Task Budget	Funding Sources	CCHE Funding	Matching Funds	Deliverables
2. Exhibition Planning, Design, and Development	\$710,000	- \$500,000 National Science Foundation - \$180,000 Anonymous Grant - \$50,000 National Science Foundation Planning Grant	0	Not counted toward match. Funds have already been raised and expended.	Detailed Below
Activity		Timeline	Deliverables		
a) Travel to 12 museums and other free-choice learning environments to research effective exhibition techniques.		Completed	<ul style="list-style-type: none"><li>• Research report: “Lessons Learned from Exhibit Planning Team Travel,” which summarized qualities of successful design elements, content delivery, and sustained operations. *</li></ul>		
b) Interview and contract with Academy Studios for preliminary design of new permanent core exhibitions. Develop preliminary design concept and text themes for fossil-based exhibition.		Completed	<ul style="list-style-type: none"><li>• Signed contract with Academy Studios.</li><li>• 15 charettes with various potential interpretive methods, content ideas, etc.</li><li>• Preliminary project budget.</li><li>• Exhibition preliminary design. *</li></ul>		
c) Contract with Institute for Learning Innovation (ILI) to conduct front-end evaluation and train staff to conduct visitor studies to assess interests, learning preferences, and responses to potential exhibition concepts.		Completed	<ul style="list-style-type: none"><li>• Signed contract with ILI.</li><li>• 104 visitor interviews completed.</li><li>• Summary report of visitor interview findings. *</li></ul>		
d) Conduct ten focus group studies to obtain input from diverse museum audiences and to test concepts and activities.		Completed	<ul style="list-style-type: none"><li>• Focus Group reports, including:<ul style="list-style-type: none"><li>◦ Conservation Experts Qualitative Research report. *</li><li>◦ Educators Qualitative Research report. *</li><li>◦ “Leaders from Underrepresented Communities” report. *</li><li>◦ Youth / Teens Focus Group report. *</li><li>◦ Senior Citizen Focus Group report. *</li><li>◦ Audiences with Special Learning Needs report. *</li></ul></li></ul>		

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.



# Question #5, Part I: What are the tasks of your project and your total project budget?

2. Exhibit Design (Continued)	Activity	Timeline	Deliverables
e)	Contract with Science Museum of Minnesota for final design and fabrication. Prepare fabrication budget and schedules.	Completed	<ul style="list-style-type: none"> <li>Signed contract.</li> <li>Detailed budget and completion schedule for exhibition fabrication.</li> </ul>
f)	Conduct research on learning in a free-choice setting, including literature review, interviews with peers/professionals, and contracting with learning research consultant.	Completed	<ul style="list-style-type: none"> <li>Research report prepared for NSF. *</li> </ul>
g)	Develop exhibition content and main message.	Completed	<ul style="list-style-type: none"> <li>Preliminary exhibition concept and main messages document. *</li> </ul>
h)	Develop preliminary schematic design based on front-end research.	Completed	<ul style="list-style-type: none"> <li>Preliminary schematic design. *</li> </ul>
i)	Scientific review of exhibition content.	Completed	<ul style="list-style-type: none"> <li>Written revisions by Museum scientists and the project's Scientific Advisory Committee.</li> </ul>
j)	Select specimens to include in exhibition.	Completed	<ul style="list-style-type: none"> <li>Specimen selection list. *</li> <li>Database of specimen descriptions, collection documentation information, and photos of specimens.</li> </ul>
k)	Produce final design of exhibition, including floor plans, elevations, and shellwork (remaining infrastructure such as walls, mechanical engineering / HVAC, electrical, lighting, ceiling panels, etc.).	Completed	<ul style="list-style-type: none"> <li>Floor plans, elevations, and schematics for all remaining shellwork. *</li> </ul>

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.

Question #5, Part I: What are the tasks of your project and your total project budget?

Task Description	Task Budget	Funding Sources	CCHE Funding	Matching Funds	Deliverables
3. Exhibition Content Development	\$200,000	- \$100,000 National Science Foundation - \$100,000 Anonymous Gift	0	Not counted toward match. Funds have already been raised and are expected to be expended before contract date.	Detailed Below
a) Art and content direction for scientific illustration, murals, model fabrication, and exhibit environments.		Oct 04 – Feb 05		<ul style="list-style-type: none"> <li>Roster by section of needed illustrations and murals.</li> <li>Sketches of models and exhibition environments.</li> </ul>	
b) Develop audiovisual story board for each component of exhibition.		Oct 04 – Feb 05		<ul style="list-style-type: none"> <li>Roster of audiovisual presentations content by section and type of file planned (audio, visual, or computer interactive). *</li> </ul>	
c) Develop preliminary sketches of interactive components for each section of exhibition.		Oct 04 – Feb 05		<ul style="list-style-type: none"> <li>Detailed roster of interactives by section, including touchable objects, trilon murals, pullout labels, flip books, lift panels, sliders, spinners, sculpted models, and mechanical interactives. *</li> </ul>	
d) Develop text for interpretive panels, specimen labels, and audiovisual scripts.		Oct 04 – Feb 05		<ul style="list-style-type: none"> <li>Completed scripts and text narratives for all sections.</li> </ul>	
e) Develop graphic design style sheet.		Oct 04 – Feb 05		<ul style="list-style-type: none"> <li>Comprehensive graphic design style sheet.</li> </ul>	
f) Produce whiteboard scale model of exhibition.		Oct 04 – Feb 05		<ul style="list-style-type: none"> <li>1/4 : 1 three dimensional scale model of exhibitions.</li> </ul>	
g) Fossil preparation and mount making.		Oct 04 – Feb 05		<ul style="list-style-type: none"> <li>Fossils removed from matrix and welded armatures designed/fabricated.</li> </ul>	
h) Refine sculpted models.		Oct 04 – Feb 05		<ul style="list-style-type: none"> <li>Detailed scale models of various display specimens.</li> </ul>	

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.

Question #5, Part I: What are the tasks of your project and your total project budget?

Task Description	Task Budget	Funding Sources	CCHE Funding	Matching Funds	Deliverables
4. Construction, Fabrication, and Installation of Core Permanent Exhibitions	\$8,000,000	<ul style="list-style-type: none"> <li>- \$1,400,000 National Science Foundation Grant</li> <li>- \$1,700,000 Major Gift</li> <li>- \$400,000 Video Display Grant</li> <li>- \$500,000 Museum Cash Resources</li> </ul>	\$4,000,000	\$4,000,000	New core permanent exhibitions in Gallery 2A and Atrium
Activity	Timeline		Deliverables		
a) Design plans for mechanical engineering/HVAC, electrical, lighting, and interior walls finish.	Mar 05 – Aug 05		<ul style="list-style-type: none"> <li>Specifications, budget, and completion schedule for each component.</li> </ul>		
b) Obtain permits needed for shellwork.	Aug 05		<ul style="list-style-type: none"> <li>Issuance of permits.</li> </ul>		
c) Finalize bids and hire general contractor for site preparation and shellwork.	Mar 05 – Apr 05		<ul style="list-style-type: none"> <li>Contractor selected and contract signed</li> <li>Completion of shellwork infrastructure needed to install, house, and operate exhibition components.</li> </ul>		
d) Complete off-site and on-site fabrication of capital components of exhibition.	Mar 05 – Mar 06		<ul style="list-style-type: none"> <li>Completion of capital components of exhibition (see detailed roster page 20).</li> </ul>		
e) Fabrication and installation of <b>non-capital exhibition components</b> (e.g., vitrines, interactives, artificial landscaping, painted murals).	Mar 05 – Mar 06		<ul style="list-style-type: none"> <li>Interactive and interchangeable elements of exhibition built and installed.</li> </ul>		
f) Fabrication and installation of <b>capital exhibition components</b> .	Nov 05 – Jun 06		<ul style="list-style-type: none"> <li>Capital components permanently installed.</li> </ul>		
g) Prepare and distribute specification manuals needed for operations and future maintenance; develop and implement annual maintenance plan.	Nov 05 – Ongoing		<ul style="list-style-type: none"> <li>Specification manuals for all exhibition components.</li> </ul>		

**Project Match:** The San Diego Natural History Museum has raised \$4 million from the sources identified above to fund the required 1:1 match. These funds are available to place into escrow immediately upon notification of a CCHE award.

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.



Question #5, Part I: What are the tasks of your project and your total project budget?

4. Exhibit Construction (Continued)	Activity	Timeline	Deliverables
h)	<p>Design, engineering, fabrication, and installation of <b>life-sized blue whale</b> suspended from ceiling of SDNHM and overlooking gallery exhibition space.</p> <ul style="list-style-type: none"> <li>Contract with Academy Studios for design, fabrication, and installation.</li> <li>Create working drawings, scale model, design engineering.</li> <li>Assemble 80' high scaffolding, two boom lifts, two fork lifts, and one scissor lift for installation.</li> <li>Prepare ventilation needs: polyethylene sheeting, fans, ducting.</li> <li>Ship, assemble, and install whale from three main body pieces, including seaming, touch up, and raising on site.</li> <li>Develop maintenance manual for ongoing maintenance and care of capital asset.</li> </ul>	Oct 05 – Dec 06	<ul style="list-style-type: none"> <li>90' long blue whale installed in a diving position from 4th floor ceiling down into the Atrium (please see picture in "Visual Description" section).</li> </ul>
i)	<p>Design, engineering, purchase, and installation of <b>high-resolution video wall</b> (20' x20') rated for 90,000 hours of usage (= 30+ years, based on daily usage of 10 hours/day).</p> <ul style="list-style-type: none"> <li>Develop specifications.</li> <li>Contract for purchase and installation.</li> <li>Purchase and Install.</li> <li>Conduct staff training in operation and maintenance.</li> </ul>	Jan 06 – Jun 06	<ul style="list-style-type: none"> <li>Installation of video wall (please see picture in "Visual Description" section).</li> <li>Begin educational programming using video wall, including: <ul style="list-style-type: none"> <li>Creating interactive mapping capacities so that visitors can create their own layered data maps (e.g., selecting geological, botanical, wildlife, and climate data for their selected region).</li> <li>Projected map of Peninsular California.</li> <li>Projected clips of nature documentaries, etc.</li> </ul> </li> </ul>

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.

Question #5, Part I: What are the tasks of your project and your total project budget?

4. Exhibit Construction (Continued)	Activity	Timeline	Deliverables
<p>j) Purchase and install <b>OmniGlobe</b>:</p> <ul style="list-style-type: none"> <li>o Contract with ARC Science Simulations for purchase of OmniGlobe.</li> <li>o Purchase and installation of content: <ul style="list-style-type: none"> <li>▪ "The Natural Earth," including clouds, night lights, and ocean bathymetry;</li> <li>▪ "The Story of Baja California";</li> <li>▪ "Paleo-Animation," depicting plate tectonics and the formation of the continents.</li> </ul> </li> <li>o Installation of OmniViewer software to allow visitors to rotate and orient the globe as desired in a fun and intuitive way.</li> <li>o User's manual and staff training to operate and maintain OmniGlobe.</li> </ul>	<p>Jan 06 – Jun 06</p>	<ul style="list-style-type: none"> <li>• Interactive, 3-dimensional representation of global subjects, including meteorological data, distribution data of biodiversity around the world, geo-politics, etc.</li> <li>• Ability for SDNHM to create content specific to Peninsular California, such as ocean depth, land elevations, geologic evolution of the peninsula, paleontological history etc.</li> <li>• Portrayal of the geologic and oceanographic history of California, including its assemblage from Jurassic and earlier archipelagos and ophiolitic remnants through subduction processes and the expression of global tectonic forces in its mountains, basins and faults.</li> </ul>	
<p>k) Purchase and installation of <b>seismograph station</b> to provide visitors with real-time data about seismic activity in southern California:</p> <ul style="list-style-type: none"> <li>o Contract with Scripps Institute of Oceanography for purchase and installation.</li> <li>o Building infrastructure preparations to accommodate seismic sensing monitor.</li> <li>o Staff training on operation and maintenance.</li> </ul>	<p>Jan 06 – Jun 06</p>	<ul style="list-style-type: none"> <li>• Installation of seismograph station</li> <li>• Real-time monitoring of seismic activity in the San Diego, southern California, and Baja California regions.</li> </ul>	

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.

Question #5, Part I: What are the tasks of your project and your total project budget?

Task Description	Task Budget	Funding Sources	CCHE Funding	Matching Funds	Deliverables
5. Complementary Education and Outreach	\$150,000	- In-kind funds from Museum resources - \$50,000 National Science Foundation Dissemination Grant (to be submitted)	0	Not counted toward match.	Detailed Below
<b>Activity</b>		<b>Timeline</b>	<b>Deliverables</b>		
a) K-12 Curriculum Development / Teacher Training.	<ul style="list-style-type: none"> <li>Research and write curriculum and other supporting educational materials.</li> <li>Correlate to California Department of Education.</li> <li>Print and distribute hard copies to San Diego County Office of Education for distribution to teachers.</li> <li>Post on SDNHM's website for worldwide access.</li> <li>Develop "Teacher Trunks" filled with touchable specimens and other hands-on learning materials for teachers to check out from the lending library and use in their classrooms.</li> </ul>	Jun 05 – Dec 06	<ul style="list-style-type: none"> <li>Pre-visit activities.</li> <li>On-site activities and follow up material to supplement and enhance student use of exhibition.</li> </ul>		

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.

# Question #5, Part I: What are the tasks of your project and your total project budget?

4. Education and Outreach (Continued)	Activity	Timeline	Deliverables
b)	Distance Learning <ul style="list-style-type: none"> <li>Develop and conduct teachers' training workshops to improve their science education instructional abilities.</li> <li>Produce broadcast content on fossil recovery and geology.</li> <li>Develop Memorandum of Understanding (MOU) with San Diego County Office of Education for distribution and presentation via Joe Rindone Regional Technology Center.</li> <li>Publicize availability of content to teachers via San Diego County Office of Education and electronic newsletters.</li> <li>Provide online access to complementary education materials.</li> <li>Begin public broadcast on Channel ITV.</li> </ul>	Jun 05 – Dec 06	<ul style="list-style-type: none"> <li>Broadcast content produced.</li> <li>MOU between SDCOE and SDNHM signed.</li> <li>Televised broadcast implemented.</li> <li>500,000 K-12 students gain improved access to high quality science instruction.</li> <li>800,000 households in the broadcast area have access to production.</li> </ul>
c)	Website Development. <ul style="list-style-type: none"> <li>Obtain content from education and exhibits departments.</li> <li>Create web pages that meet public access guidelines.</li> </ul>	Jun 05 – Jun 06	<ul style="list-style-type: none"> <li>Interactive website that provides on-line access to Museum exhibition, curriculum and field guide.</li> <li>At least 50 new pages created.</li> <li>At least 1 million unique visitors annually.</li> </ul>
d)	Fossil Preparation Laboratory <ul style="list-style-type: none"> <li>Equip and staff laboratory.</li> <li>Create and present 10 minute video on fossil recovery and preparation.</li> </ul>	Jun 06 – Dec 06	<ul style="list-style-type: none"> <li>200 square foot laboratory.</li> <li>Public access to live fossil preparation and interaction with Museum scientists.</li> <li>10 minute video on fossil recovery and preparation.</li> </ul>

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.

# Part Two - six Questions

## Question #5, Part I: What are the tasks of your project and your total project budget?

Task Description	Task Budget	Funding Sources	CCHE Funding	Matching Funds	Deliverables
6. Project Evaluation and Remediation	\$69,000	Included in Item 4 Budget National Science Foundation Grant	0	Not counted toward match.	See detail below
<b>Activity</b>		<b>Timeline</b>			<b>Deliverables</b>
a) Contract with Institute for Learning Innovation to conduct summative evaluation.		Jan 06 – Dec 06			<ul style="list-style-type: none"> <li>Report on effectiveness of exhibition components and messages.</li> </ul>
b) Design and conduct summative evaluation. <ul style="list-style-type: none"> <li>Tracking, timing and observation of visitors.</li> <li>Longitudinal study to quantify visitor learning over time.</li> <li>Conduct teachers' focus group to assess effectiveness of curriculum, teacher training, online field guide and teacher trunks.</li> <li>Evaluation of project web pages to assess use of different website components and success of website interactives.</li> </ul>		Jul 06 – Dec 06			<ul style="list-style-type: none"> <li>Signed contract with Institute for Learning Innovation.</li> <li>Report on evaluation findings, which will include both quantitative and qualitative data on the attracting and holding power of exhibits; usage and effectiveness of educational materials and programs; and website.</li> </ul>
c) Conduct remediation of exhibits to ensure optimal visitor experience: <ul style="list-style-type: none"> <li>Use summative evaluation finding to fine tune exhibit (clarify signage, adjust heights of graphics/text panels, etc.)</li> <li>Establish maintenance and records log to document which exhibits are working well and those that need frequent repair. Make needed improvements.</li> </ul>		Sep 06 – Dec 06			<ul style="list-style-type: none"> <li>Remediation conducted.</li> <li>Exhibit promotes optimal visitor experience.</li> </ul>
d) Dissemination of findings: <ul style="list-style-type: none"> <li>Write articles for professional journals sharing methods, challenges and results of: <ul style="list-style-type: none"> <li>Bilingual/binational aspects of free choice learning;</li> <li>Developing exhibitions that emphasize socially mediated learning; and</li> <li>The use of new technology in exhibition design.</li> </ul> </li> </ul>		Dec 06 – ongoing			<ul style="list-style-type: none"> <li>Published articles in professional journals such as <i>Exhibitionist</i>, <i>Museum News</i>, and <i>Curator</i>.</li> <li>Presentation of findings at museum conferences (e.g. Western Association of Museums, American Association of Museums).</li> </ul>

\* Deliverables with an asterisk are not attached due to space limitations, but are available for reviewers upon request.

### Principal Personnel

Resumes of principal personnel follow this biography section  
Each person's project duties are cross-referenced to Question #5's chart

**Dr. Michael W. Hager, Executive Director**, has over 40 years of professional experience in museum operations. Trained as a scientist, he earned a B.A. in Biology from Grinnell College and a Ph.D. in Geology from the University of Wyoming, specializing in paleontology. He gained experience with research, interpretation, and teaching as a curator, consultant, and assistant professor. He previously served as Director of the Museum of the Rockies (1978-89) and Director of the Virginia Museum of Natural History (1989-91). He has been in his current position as Executive Director of the San Diego Natural History Museum since 1991. His role in this project is to align permanent exhibit development with the Museum's overall vision and strategic plan. He is also leading the campaign for exhibit fundraising, working closely with the Museum's board of directors to secure all needed resources. **Tasks: 1; oversight of all others**

**Dr. Thomas Démeré, Curator of Paleontology**, will ensure scientific accuracy of the new permanent exhibitions and select fossils from the Museum's collection for display. Dr. Démeré's research interests are in Cenozoic paleontology and geology of southern California and northern Baja California. His invertebrate paleontological work has concentrated on Plio-Pleistocene molluscan biostatigraphy, paleoecology, and taphonomy. His vertebrate paleontological work focuses on documenting and understanding the evolutionary history of marine mammals (pinnipeds and cetaceans). Dr. Démeré is involved with field investigations to discover new fossil remains of early pinnipeds and cetaceans. He received his B.S. in Geology from San Diego State University, his M.S. in Geology from University of Southern California and his Ph.D. in paleobiology from University of California, Los Angeles. He has been employed by the San Diego Natural History Museum since 1979. He is currently Curator of the Department of Paleontology, where he occupies the Joshua L. Bailey, Jr. Chair of Paleontology. **Tasks: 2i, j**

**Dr. Exequiel Ezcurra, Director of Mexico's National Institute of Ecology** (appointed by President Fox) and **Director of the Biodiversity Research Center of the Californias (BRCC)** San Diego Natural History Museum (on leave), will provide scientific content review for this project from an ecologist's perspective. He will also facilitate interactions with Mexican agencies consulted with for content development. Highlights of his 30-year career include developing the first environmental impact assessments in Mexico and promoting creation of the California Condor release program in Baja California, Mexico. He has received numerous awards for his professional contributions to the field on ecology, including the prestigious Conservation Biology Award from the Society for Conservation Biology in 1994. In 2001, Mexican President Vicente Fox personally recruited Dr. Ezcurra to serve in his cabinet as Director of Mexico NIE. **Task: 2g, i**

**Jim Stone, Deputy Director of Public Programs**, will direct the implementation of this permanent exhibit project, ensuring its quality and completion. Mr. Stone will also oversee the educational outreach and marketing components of this project. He has over 25 years of operations and management experience in informal science learning organizations, including serving as the Vice President of Programs at the Mystic Aquarium. He has a B.S. in biology and is a certified high school teacher. He has also published several articles about animal life and student learning via informal science education, including one of the first studies documenting the affective and cognitive effects of using live animals in educational programs. **Tasks: 2 – 6; oversight of all**

**Tim Murray, Director of Exhibits**, will serve as project administrator, coordinating and planning logistics between the Science Museum of Minnesota, Academy Studios, and museum staff. Mr. Murray has supervised the exhibits staff since 1991. With nearly 25 years in the exhibits field, Mr. Murray has experience in all aspects of exhibit planning, design, fabrication, and installation. He has established and maintained a long-range traveling exhibit schedule. Mr. Murray has been very effective in coordinating the many consultants, contractors, content specialists, and staff involved in the creation of permanent exhibits, and has built a very strong exhibits team that is used by other institutions for contract assignments. **Tasks: 2 - 4**

**Question #6: Project Team and Supporting Documents**

**Nancy Owens-Renner, Exhibit Developer**, will partner with the Science Museum of Minnesota to develop content, integrate audience needs into the presentation of information, and lead the evaluation efforts. Ms. Owens-Renner has worked in Museums for over 15 years, first in graphic information design, and more recently in exhibit development. Her understanding of communications, psychology, sociology, learning theory, visitor studies, and scientific principles make her uniquely qualified to function as exhibit developer and writer. Ms. Owens-Renner has developed several bilingual exhibits using her team approach. She initiated and maintains an ongoing visitor research program at the Museum. Her continuing education efforts are focused on museum studies and Spanish language. She holds a Bachelor of Arts degree from Northwestern University, and is active in both the San Diego Evaluators Group and the Visitor Studies Association. For this project she **Tasks: 2, 3, 6**

**Dr. Paisley Cato, Curator of Collections**, has 25 years of museum collections experience. She has a PhD in Wildlife & Fisheries Sciences and an MA in Museum Studies. She has published extensively, sharing her expertise in administration aspects of collections management. For this project, Dr. Cato will oversee care of specimens used in the exhibition, and assist with editing of test panels and web pages. **Tasks: 2 i, j; 3d**

**Dolores Monterrubio Alvarez, professional educator** in Mexico. She also serves as the Director of Teacher Training for the San Diego Natural History Museum's binational education program PROBEA (Proyecto Bioregional de Educacion Ambiental.) Her education and subsequent professional development have focused on using the environment as an integrating theme for instruction and on developing effective teaching methods to address multiple learning styles. For this project, Dolores will serve as a consultant to develop the Museum's bilingual content and signage, translate its curriculum into Spanish materials, and help develop culturally appropriate messages and delivery methods for the Museum's Latino outreach activities. **Tasks: 3d; 5a; 6d**

**Supporting Project Personnel**

**George Brooks-Gonyer, Chief Operating Officer**, will coordinate permanent exhibit plans with daily Museum operations, negotiate all contracts, and manage project finances. Mr. Brooks-Gonyer has more than 25 years of finance experience in a variety of professional environments including financial services, manufacturing, consumer products, and the fast food industry. As a Chief Financial Officer, his responsibilities have included the full range of financial and accounting functions as well as risk management, legal, investor relations, treasury, and human resources. He is a CFO Partner in the prestigious Tatum Partner network, which provides a broad network of financial resources and information technology leadership to its Partners throughout the United States. He holds a Master's Degree in Business from Harvard University and a Bachelor's Degree in Economics from Trinity College. **Tasks: financial oversight of all tasks**

**Carol Radford, School Programs Manager**, will integrate exhibit planning and education program development. The Education Department offers approximately 300 programs per year on a variety of natural history topics. She is responsible for the development of new programs (pre-school through eighth grade); training and supervising instructors; writing teachers guides for exhibitions; participating in community and professional meetings; and managing school related grants and contracts. Ms. Radford has been at the San Diego Natural History Museum for 24 years, and will be the primary author of the project's K-12 curriculum. **Tasks: 5a**

**Elizabeth Schiff, Deputy Director of Institutional Development**, has over thirty years of professional fundraising experience. Twenty of those years were at the University of San Diego, a model organization for the successful implementation of multi-million dollar capital projects. As director of capital programs there Ms. Schiff was responsible for building and endowment fundraising, and managed the final phase of a \$47.5 million campaign which exceeded its goal by ten percent. At the San Diego Natural History Museum she has been responsible for several successful fundraising campaigns, including the Museum's binational multidisciplinary exhibition and its 2003-2004 exhibition season. For this project she will be responsible for raising annual funding for program sustainability, as well as overseeing proper recognition of CCHE as outlined previously in the application. **Task: 5a**



## Question #6: Project Team and Supporting Documents

**Janet Morris, Director of Volunteer Services**, will recruit and schedule volunteers to support the projects education and outreach activities. She will also create training sessions with museum scientists to increase volunteer roles (e.g. outreach docents, exhibition docents, paleontology volunteers). **Tasks: 5a**

**Elizabeth Castillo, Director of Foundation Relations**, has ten years of fundraising experience, securing more than \$14 million in funding for community health clinics, school districts, non-profit and government agencies. Her experience began at Clinicas de Salud del Pueblo in Imperial County, California, where she served as the lead fundraiser for construction of a new \$5 million clinic in Brawley. She has worked at the Museum for the past five years, raising operating and project support for the Museum's exhibition, research, and education programs. She has experience living and working in a bi-cultural environment and speaks both English and Spanish. She will support this project by raising the funding needed to sustain its K-12 education, outreach, and Museum Access Fund programs. **Tasks: fundraising for 5a**

**Debbie Walden, Website Manager**, and **Cary Canning, web assistant**, have a combined Internet experience of over 12 years within the corporate and non-profit environments. They will integrate the website into permanent exhibit programming as a means of extending and enriching exhibit content and interactivity. Responsibilities include creation and implementation of the project's web components with an emphasis on content richness and accessibility. Components will include a virtual tour of the exhibition, expanded fossil field guide, virtual conversations with researchers, information on science careers, and list of fossil field trips that will support the exhibit experience. **Tasks: 5c**

**Mark Rosenbaum, IT Director**, will ensure the Museum's technology infrastructure is in place to support the successful implementation of this project with a special emphasis on the website. Mark started his career in computers in 1978 as a Field Engineer for IBM. He worked for IBM for 17 years in Los Angeles and San Diego. He also worked for NEC in San Diego for two years as a senior support engineer, and supported NEC Field Engineers throughout the United States. After leaving NCE he worked for Peregrine Systems for five years as a Senior Customer Support Engineer and a Systems Engineer. From 2002 to August 2004 he worked as a consultant for Robert Half Technologies and ran his own business, ComputerWerx. **Tasks: support all tasks**



**Question #6: Project Team and Supporting Documents****Project Partners****Academy Studios**

Located in Novato, CA, Academy Studios was founded in 1990 by President/CEO Dean Weldon. They offer comprehensive museum exhibition planning, design, fabrication and installation services. Academy Studios will work with the Museum staff to design, engineer, fabricate and install the giant blue whale in the Atrium. Academy Studios is well known for its ability to sculpt and fabricate accurate, full-sized replicas of charismatic megafauna for clients world-wide. **Tasks: 2b, 4h**

**Science Museum of Minnesota (SMM)**

The Science Museum of Minnesota is a large regional science museum whose programs combine research and collection facilities, a public science education center, extensive teacher education and school outreach programs, and an Imax Convertible Dome Omnitheater. The Science Museum constantly explores and implements new technologies to educate their audience about science. The SMM's research and collections division and St. Croix Watershed Research Station provide significant ongoing scientific research in the areas of anthropology, paleontology, biology, and environmental sciences.

SMM is partnering with SDNHM for design, development, fabrication, and installation of the exhibition as well as managing many aspects of the project. They joined the project team when the exhibit design was 80% complete and will complete their tasks by June 2006 pending full funding of the project. **Tasks: 4a - g**

**Dr. Tanya Atwater**, currently a Professor of Tectonics at the University of California, Santa Barbara, brings a wealth of professional and academic experience to this project. She is one of the worlds leading experts on plate tectonics and was a pioneer in the development of plate tectonics theory. She holds a B.A. in Geophysics from the University of California, Berkeley, and a Ph.D. from Scripps Institute of Oceanography in Earth Science. Dr. Atwater's research has taken her to Nepal, Iceland, Afghanistan, India, Chile, Antarctica, Newfoundland, Cyprus and most places in between. She is an active participant in the field of public education, and frequently speaks at workshops, academic colloquia and community groups. **She is an elected member of the National Academy of Science. Tasks: 2i**

**Dr. Patrick Abbott** has devoted his life to the research and communication of geological discovery: his specialties include sedimentology of Mesozoic and Cenozoic rock, archaeological geology, ancient soils and climates, and the impact of humankind on Earth. Dr. Abbott's course, "Natural Disasters", is one of the most popular at San Diego State University, where he has been a Professor in the Department of Geological Sciences since 1977. He has served on, and acted as president of, local and national boards, and enjoys organizing and participating in public lecture series. **Tasks: 2i**

**Question #6: Project Team and Supporting Documents****Dr. Rudy Castruita, Superintendent of Schools, San Diego County Office of Education**

Dr. Castruita, a member of the Museum's Board of Trustees, has been San Diego County Superintendent of Schools since 1994. Prior to coming to San Diego, he served as Superintendent of the Santa Ana Unified School District for six years, where the district earned numerous awards and recognitions under his leadership including Golden Bells, federal Blue Ribbon Schools, and California Distinguished Schools. He has received the Marcus Foster Award from ACSA in 1991 and was named California's Superintendent of the Year in 1992. Dr. Castruita chaired a state-wide effort to set standards for high school graduates in the state of California, and currently serves on the State Superintendent's Advisory Committee for implementing the Public School Accountability Act of 1999, the Governance Task Force of the state-wide committee to develop a Master Plan for Education, and State Reading First Committee. Under Dr. Castruita's leadership, the San Diego County Office of Education has taken a leadership role in literacy efforts and the development of a state-of-the-art regional technology center. He was recently named one of 12 "tech savvy" superintendents in the nation by eSchool News. Dr. Castruita serves on several national boards including Scholarship America and the prestigious Education Research & Development Institute. Recently, Dr. Castruita was nominated by the President of the United States and appointed by Donald Rumsfeld, U.S. Secretary of Defense, and Rod Paige, U.S. Secretary of Education, to serve on the President's Advisory Board for the Department of Defense Schools, which are military-based schools overseas. Local board leadership includes the Greater San Diego Chamber of Commerce, San Diego United Way/CHAD, the San Diego YMCA, the San Diego Natural History Museum, Laurels for Leaders, and the California Center for the Arts.

**Tasks: 5a and 5b**

**Institute for Learning Innovation (ILI)**

ILI is an Annapolis, MD-based non-profit learning and research and development organization founded by Dr. John Falk (14 years experience as the Director of Educational Research at the Smithsonian Institution.) Incorporated in 1986 as a 501(c)3 non-profit, the Institute has almost 20 years of experience conducting basic research and evaluation. Clients include zoos, museums, science centers, botanical gardens, aquariums, and public television stations. ILI also has a strong track record of developing learning resource materials and programs, and conducting professional development trainings. ILI is committed to advancing learning through the dissemination of research and evaluation findings through books, articles, and presentations. The Institute has consulted on front-end evaluation for this project and will direct the summative evaluation effort for the exhibition, associated educational materials, and website. **Tasks: 2c, d, f; 6**

**Joe Rindone Regional Technology Center at the San Diego County Office of Education**

A key partner in our project is the San Diego County Office of Education's Joe Rindone Regional Technology Center (JRRTC). Serving 42 school districts, and 25,000 classrooms, the Center functions as a hub of educational information, resources, and technological support for local school districts, and their supporting communities. A direct fiber optic link between the Museum and JRRTC gives us the ability to provide content to schools throughout San Diego County via Internet and the Center's educational television channel, which is distributed through a microwave network and cable. The mission of the Joe Rindone Regional Technology Center is to improve student achievement, educational leadership and home/school partnerships through the use of advanced technologies. **Tasks: 5b**

**ARC Science Simulations** was incorporated in 1981 as Applied Research & Consulting by Thomas Ligon in Loveland, Colorado. In 1989 the business was redirected toward science software with the release of Dance of the Planets®. The company then developed Earth-from-space visualization products which led to the creation of the Face of the Earth™ cloudless earth image released in 1995. Their most recent invention is the OmniGlobe®, an interactive digital globe that is the first and only self-contained spherical display primarily intended for global visualizations. The hallmark of ARC products and creations is a tight adherence to high aesthetic quality and good science. **Tasks: 4**

**Question #6: Project Team and Supporting Documents****Scripps Institute of Oceanography**

The Visualization Center at Scripps Institute of Oceanography, University of California, San Diego will provide both the equipment and the technical expertise for the seismograph station. The Center is a state-of-the-art visualization facility for presenting and manipulating very large datasets. The Center employs a wide range of hardware and software to give the user a totally immersive working environment in which to display, analyze, and discuss significant geophysical events, processes and features such as earthquakes, seafloor spreading, uplifting and fault zones. **Tasks: 4k**

**Binational Advisory Board**

Mr. Enrique R. Hambleton (Chair)	Vice President of PRONATURA, Noroeste
L. Susan Anderson, Ph.D.	Northwest Mexico Director, The Nature Conservancy
Dr. James F. Clements	Chairman & Publisher - Ibis Publishing Company
Dr. Exequiel Ezcurra	President of the Mexican National Institute of Ecology
Mr. Martin Goebel	President, Sustainable Northwest
Mr. Richard Kiy	President & CEO, International Community Foundation
Sergio Knaebel	Program Officer, The David & Lucile Packard Foundation
Dr. Gastón Luken	President, Grupo Próxima
Mr. Steven P. McDonald	Partner, Luce, Forward, Hamilton & Scripps
Lic. Rodolfo Ogarrio	Executive President, Fundacion Mexicana para la Educacion Ambiental A.C.
Mr. Rudolph J. Rehm	Founder, The Welin Group
Dr. Norman C. Roberts	Investment Counselor & Conservationist
Ms. Christy Walton	Trustee: The Walton Family Foundation & Founder, Harborside School
Roberto Valdez	Land & Planning Development

**Task: Responsible for providing program expertise; provide fundraising leadership to ensure success of sustained operations.**

Question #6: Project Team and Supporting Documents

Science Advisory Committee

Pat Abbott, Ph.D.

Professor of Geology, San Diego State University

Francisco Aranda Manteca, Ph.D.

Paleontologist, Universidad Autonoma de Baja California

Tanya Atwater, Ph.D.

Geologist, University of California, Santa Barbara

Annalisa Berta, Ph.D.

Paleontologist, San Diego State University

Lowell Dingus, Ph.D.

Paleontologist, Info Quest Foundation

Jorge Ledesema Vazquez, Ph.D.

Geologist, Universidad Autonoma de Baja California

Mark Goodwin

Paleontologist, University of California, Berkley

Jack Horner

Paleontologist, Museum of the Rockies

Michael Wallawender, Ph.D.

Geologist, San Diego State University

Jack Wolfe, Ph.D.

Paleobotanist, U.S. Geological Survey

The Scientific Advisory Committee will assist with content development to ensure the scientific accuracy of the exhibition. This includes serving on a peer review panel to critique the preliminary design and content. Six members will also provide input to the exhibit planning team in person.

Tasks: 2i; 3d

Education Advisory Committee

Dolores Monterrubio Alvarez	Bilingual education consultant
Vince Bayard	Museum Docent
Kim Bess	Director of Science and Educational Technology San Diego City Schools
Ken Catlin	Elderhostel
Judy Cook	Science Resource Teacher Webster Elementary Life Sciences Academy
Roy L. De Vault	Executive Director San Diego County 4-H Youth Education Foundation
Patty Eshleman	Director, Unitarian Cooperative Preschool Early Education specialist
Rebecca Haddock	High Tech High
Debbie and David Myer	Homeschool Educators
Nola Madvey	Acting Principal, Barona Indian School
John Shelton, Ph.D	Pomona College (retired) Geologist, Science Educator
Bill Simpson	Director of Staff Development and Media Services Joe Rindone Regional Technology Center San Diego County Office of Education
Bill Stevens	Educator, Balboa Park Program
Margie Stinson	San Diego Community College District Biologist, Science Educator
Art Sussman, Ph.D.	WestEd, Systems Scientist, Educator
Nancy Taylor	Science Coordinator/PISCES Project Director San Diego County Office of Education
Cristina Wallace	Migrant Education
John Yuskiw	Special Needs Teacher, Roosevelt Junior High

**Tasks: Oversight of 5a**

Michael W. Hager, Ph.D.  
Executive Director  
San Diego Natural History Museum  
P. O. Box 121390  
San Diego, CA 92112

## EDUCATION

Ph.D., 1973, Geology and Paleontology, University of Wyoming, Laramie, Wyoming  
B.A., 1964, Biology, Grinnell College, Grinnell, Iowa.

## EXPERIENCE

### Executive Director, San Diego Natural History Museum, 1991 – present

Duties include responsibility for preparing and managing a \$7.5 million budget; personnel management and staff development for up to 120 employees and 783 volunteers; strategic planning and development of a \$40 million multiple phase Capital Campaign; supervision and direct involvement in architectural planning of an 90,000 sq. ft. building addition and a 60,000 sq. ft. renovation; supervision of and direct involvement in planning of 30,000 sq. ft. of new permanent exhibitions and major new program designs including the Biodiversity Research Center of the Californias and the Environmental Science Education Center; direct involvement with the Capital Campaign Committee and Board of Trustees in fundraising strategy, design, organization, proposal development and solicitation; supervision of a research division with more than 8.1 million specimens and a research library of 90,000 volumes; supervision of an educational outreach program reaching 100,000+ students annually; and supervision of a Museum with 400,000+ visitors per year; Executive Producer of an giant-screen film about Baja California.

### Director, Virginia Museum of Natural History, 1989-1991, Martinsville, Virginia

Duties included responsibility for preparing and managing a \$2.4 million budget; personnel management and staff development for up to 42 employees; planning and supervising a \$1.6 million renovation; operation of statewide as well as international programs of research, education and exhibits.

### Director, The Museum of the Rockies, 1978-1989, Montana State University, Bozeman, Montana.

Involved in the designing of and fundraising for a \$9.5 million expansion of the Museum of the Rockies in addition to supervising an active Museum program. From 1978 to 1989, the budget grew from \$89,500 to over \$2.5 million, the staff increased from 3 to 30 full-time employees and Museum visitation increased from 10,000 to 150,000 per year.

Assistant Professor of Geology and Director, 1973-1978, Fryxell Geology Museum, Augustana College, Rock Island, Illinois.  
Museum consultant, 1973-1978, Historic New Harmony, Inc., New Harmony, Indiana.  
Geology Department, 1969-1983, University of Wyoming, Laramie, Wyoming.  
Curator of Natural History, 1965-1969, Davenport Public Museum, Davenport, Iowa.

## PROFESSIONAL SERVICE:

Member, San Diego Dialogue  
Member, San Diego State University Biological Field Station Strategic Planning Committee  
Board of Directors, Elementary Institute of Science  
Board of Directors, Immigration Museum of New Americans  
Board of Directors, Balboa Park Cultural Partnership  
Member, Visiting Committee (American Association of Museum's Accreditation Commission)  
Past President, Association of Science Museum Directors

## SELECTED PUBLICATIONS

- 1984 Eshelman, Ralph, and Hager, Michael. Two Irvingtonian (Medial Pleistocene) vertebrate faunas from north central Kansas. In Contributions in Quaternary Paleontology, Guilday Memorial Volume; Special Publication No. 8, Carnegie Museum of Natural History.
- 1980 Miller, B.B., Eshelman, R.E. and Hager, M.W. A molluscan faunule collected beneath the Hartford Ash (0.71 MYBP), Jewell County, Kansas. Abstract, Geological Society of America.
- 1975 Late Pliocene and Pleistocene History of the Donnelly Ranch Vertebrate Site; southeastern Colorado. Contributions to Geology, Special Paper No. 2.

## Question #6: Project Team and Supporting Documents

**THOMAS A. DEMÉRÉ, PH.D.**

Department of Paleontology  
 San Diego Natural History Museum  
 San Diego, CA 92112  
 (619) 232-3821, ext. 232

**EDUCATION**

University of California, Los Angeles, Ph.D. Biology, 1994  
 University of Southern California, M.S. Geology, 1978  
 San Diego State University, B. S. Geology, 1972

**EMPLOYMENT**

Curator; Department of Paleontology, San Diego Natural History Museum (SDNHM), 1994 - present.  
 Interim Director; Research and Collections Division, SDNHM, 1994 - 1997.  
 Adjunct Faculty, Department of Geological Sciences, San Diego State University, 1995 - present.  
 Assistant Curator; Department of Paleontology, SDNHM, 1992 - 1994.  
 Collections Manager; Department of Paleontology, SDNHM, 1984 - 1992.  
 Curatorial Assistant; Department of Paleontology, SDNHM, 1978 - 1984.  
 Lecturer; National University, San Diego, CA, 1982 - 1984.  
 Micropaleontologist; Anderson, Warren & Associates, Inc., San Diego, CA, 1973 - 1978.

**RESEARCH GRANTS**

1983-1984. National Geographic Society (2754-83; PI. \$10,100). Late Pliocene marine vertebrates: A bone bed quarry  
 1993. National Geographic Society (4971-93; PI. \$14,038). The Excavation at a Pleistocene mastodon site in San Diego County, California  
 1995-1999. National Science Foundation (DEB-9419803; PI. \$89,924). Phylogenetic and functional analyses of fossil and living walruses (Pinnipedia: Odobenidae)

**RESEARCH INTERESTS**

Mammalian phylogeny and systematics  
 Cetacean phylogeny, systematics, and paleobiology  
 Odobenid phylogeny, systematics, and paleobiology  
 Tertiary molluscan taxonomy and paleoecology  
 California Tertiary biostratigraphy

**SELECTED PUBLICATIONS**

1984. Domning, D. P., and T. A. Deméré. New material of *Hydrodamalis cuestae* (Mammalia: Dugongidae) from the Miocene and Pliocene of San Diego County, California. *Transactions, San Diego Society of Natural History* 20: 169-188.
1986. Deméré, T. A. The fossil whale, *Balaenoptera davidsonii* (Cope, 1872), with a preliminary taxonomic review of Neogene balaenopterids of the world (Cetacea: Mysticeti). *Marine Mammal Science* 2: 277-298.
1991. Walsh, S. L., and T. A. Deméré. Age and stratigraphy of the Sweetwater and Otay formations, San Diego County, California. In, Abbott, P. L., and J. A. May (eds.), *Eocene Geologic History, San Diego Region. Society of Economic Paleontologists and Mineralogists, Pacific Section, Book 68*: 131-148.
1994. Deméré, T. A. Two new species of fossil walruses (Pinnipedia: Odobenidae) from the upper Pliocene San Diego Formation, California. In, Berta, A. and T. A. Deméré (eds.), *Contributions in Marine Mammal Paleontology Honoring Frank C. Whitmore, Jr. Proceedings, San Diego Society of Natural History* 29:77.

**ACADEMIC ADVISING**

San Diego State University - advisor for 2 M.S. graduate student. University of California, San Diego - advisor for 1 honors program undergraduate student. Universidad Autonoma de Baja California - advisor for 1 Ph.D. and 1 M.S. graduate students.

## Question #6: Project Team and Supporting Documents

PAISLEY S. CATO, Ph.D.

## PROFESSIONAL PREPARATION

Smith College, Northampton, Mass., B.A. cum laude, Zoology, 1975.

Texas Tech University, Lubbock, M.A., Museum Studies, 1980.

Texas A&amp;M University, College Station, Ph.D., Wildlife &amp; Fisheries Sciences, 1990.

## APPOINTMENTS

Curator of Collections, San Diego Natural History Museum; 1998- present

Consultant for Museum Services (institutional development, editing, collection care instructor); 1996-present

Interim Director, Virginia Museum of Natural History; 1995-1996

Head, Collections Department, Virginia Museum of Natural History; 1990-1996

Collection Manager, mammals &amp; frozen tissues, Texas Cooperative Wildlife Collection, Texas A&amp;M University; 1982-1989

Lecturer, Department of Wildlife &amp; Fisheries Sciences, Texas A&amp;M University; Fall, 1986, 1987.

Curator, Zoological Collections, Denver Museum of Natural History; 1980-1981.

Field Assistant (Suriname Expedition), Carnegie Museum of Natural History; April-June 1980.

Curatorial Assistant, The Museum, Texas Tech University; 1978-1980.

Collection Management Researcher, Denver Museum of Natural History; 1977- 978.

## PRIMARY PUBLICATIONS

Cato, P.S., J. Golden, and S. McLaren, compilers. Terminology for Managing and Preserving Collections. Society for the Preservation of Natural History Collections. In press.

Cato, P.S. Natural history specimens. In *Basic Condition Reporting: A Handbook*. (M. Demeroukas, ed.) Southeastern Registrars Association, FL. Pp. 73-88, 1998.

Cato, P.S., R.R. Waller, L. Sharp, J. Simmons, and S.L. Williams. *Developing Staff Resources for Managing Collections*. Spec. Pub. 4. Virginia Museum of Natural History, Martinsville, 1996.

Williams, S.L. and P.S. Cato. Interaction of research, management, and conservation for serving the long-term interests of natural history collections. *Collection Forum*, 11(1):16-27, 1995.

Cato, P.S. Variation in operational definitions of natural history in a sample of natural history-oriented museums. *Museum Management and Curatorship*, 13(3):251-263, 1994.

Cato, P.S. and S.L. Williams. Guidelines for developing policies for the management and care of natural history collections. *Collection Forum*, 9(2):84-107, 1993.

Cato, P.S. The value of natural history collections in Latin American conservation. Pp. 416-430 in *Latin American Mammals: History, Biodiversity, and Conservation* (M.A. Mares and D.J. Schmidly, eds.), University of Oklahoma Press, 1991.

## SYNERGISTIC ACTIVITIES

- Panel member for IMLS Conservation Project grants (1999-2000)
- Instructor for University of Victoria's Cultural Resource Management Program, teaching *Management of Natural History Collections*.
- Active participant in operation of the Society for the Preservation of Natural History Collections. Council Member-at-Large. Recently served as Principal Investigator for grant from National Center for Preservation Technology and Training.
- Five years as managing editor of *Collection Forum*.
- Project Director for multiple IMLS Conservation project grants. Most recently these included grants for mineral collection (1998-1999), mammal collection Phase I (1999-2000), mammal collection Phase II (2000-2001), and entomology collection (2001-2002).
- Participant as Beta tester for SPECIFY (NSF-funded database system in development at the University of Kansas)



## Question #6: Project Team and Supporting Documents

**JAMES D. STONE**

jstone@sdnhm.org

Experienced Project Leader in fostering Environmental Stewardship and Awareness through Informal Learning Programs, Educational Exhibits, Web-based Experiences and Public Events. Collaborative style combining strong marketing and communications skills with strategic alliance-building to achieve powerful educational experiences. A creative problem solver with results-oriented focus in environments where public awareness is key.

**EXPERIENCE**

SAN DIEGO NATURAL HISTORY MUSEUM, San Diego, CA

**Deputy Director of Public Programs**

Senior Administrator responsible for Museum Exhibitions, Education Programs, Visitor Services, Marketing and Web Site

***Director, Environmental Science Education Center***

Department Head responsible for School, Public and Bi-national Education programs

SEA RESEARCH FOUNDATION, INC, Mystic, CT

***Vice President of Programs, Mystic Aquarium******Assistant Vice President of Programs, Mystic Aquarium***

Senior Administrator Responsible for Education, Exhibits, Visitor/Member Services and Technology.

***Director of Exhibits, Mystic Aquarium***

Department Head responsible for exhibit development

***Director of Membership, Mystic Aquarium***

Department Head responsible for membership development and programs

***Assistant Director of Development, Mystic Aquarium******Development Officer responsible for grant writing and grant stewardship******Assistant Director of Education, Mystic Aquarium******Assistant Department Head Responsible for program development*****Education Specialist, Mystic Aquarium*****Instructor for School and Member Programs*****EDUCATION**

Bachelor of Science Degree in Biology, Southern Connecticut State University

Graduate courses in Education taken at SCSU and the University of Rhode Island

Rhode Island Teaching Certificate for Secondary Level Biological Sciences

**PUBLICATIONS**

Stone, J. 1978. The Sound of Silence. Bird Watchers Digest. 1 (1): 44-45.

Stone, J. 1981. Birds of Connecticut Salt Marshes. Bul. No. 27. Conn. Arboretum, New London, CT. 48 pp.

Stone, J. 1989. A Quick Reference on 10 Marine Topics. Sea Research Foundation, Inc., Mystic, CT. 38 pp.

Sherwood, K., Rallis, S, and Stone, J. 1989. Effects of Live Animals vs. Preserved Specimens on Student Learning. Zoo Biology. 8:99-104

**OTHER ACTIVITIES**

Organized and led the following ecotourism expeditions: Napo River of Ecuador (tropical rain forests), Bermuda (coral reefs/island ecology), Costa Rica (tropical rain forests) Culebra Island, Puerto Rico (coral reef fish communities), Sea of Cortez (birds, marine mammal ecology), Galapagos Islands (island ecology/wildlife), Gulf of Saint Lawrence (blue whales/seabirds), US and British Virgin Islands (coral reefs).

Question #6: Project Team and Supporting Documents

**Tim Murray**

Director of Exhibits  
San Diego Natural History Museum  
PO Box 121390, San Diego, Ca. 92112-1390

**Education**

San Diego State University; B.A. Professional Studies - Fine Arts (1983)

**Professional Experience**

**San Diego Natural History Museum**

1991-Present

*Director, Exhibits Department*

Responsibilities include overseeing design, development, production, and installation of all temporary and permanent exhibitions, supervising and coordinating exhibits design and production staff, preparing and monitoring schedules and budgets, maintaining production standards, and management of all exhibit design contracts. Recent interpretive contract projects include conceptual exhibit design for the San Dieguito River Park's Piedras Pintadas site, development, design and fabrication at the Tecolote Nature Center, exhibit upgrade and exhibit design and fabrication at the Mission Trails Regional Park Visitor Center and Los Penasquitos Lagoon/ Torrey Pines State Park.

**San Diego Natural History Museum**

1985-1991

*Assistant Chair of Exhibits Department*

**San Diego Natural History Museum**

1983-1985

*Preparator*

**San Diego State University/ University Art Gallery**

1979-1982

*Gallery Assistant*

**Affiliations**

National Association for Museum Exhibitions

American Association of Museums

Western Museum Association

**Question #6: Project Team and Supporting Documents**

Nancy Owens Renner  
San Diego Natural History Museum  
PO Box 121930, San Diego, CA 92112  
619-255-0174  
nowensrenner@sdnhm.org

**Education**

1986 B.A., Art Theory and Practice, Northwestern University

Independent Study: Learning Theory, Child Development, Evaluation methodology,  
Spanish, Natural Sciences

**Professional Experience**

San Diego Natural History Museum

Exhibit Developer, 1997- present

- lead for museum exhibit evaluation projects

Graphic Designer for Exhibits, 1996-1997

San Diego Museum of Art

Graphic Designer, 1988-1995

Sea World of California

Set Designer / Scenic Artist, 1986-1987

**Notable Exhibit Projects (San Diego Natural History Museum)**

SDNHM Master Plan for Permanent Exhibits: Schematic Design

Natural Treasures: Past & Present / Tesoros Naturales del Pasado y Presente

Desert and Sea: Visions of Baja California /

El Desierto y el Mar: Imágenes de Baja California

Sharks and Rays in Our Waters / Tiburones y Rayas en Nuestras Aguas

A Lost World: San Diego County 75 Million Years Ago

Reptiles: Real and Robotic

Los Peñasquitos Lagoon: A Lagoon Full of Life

San Diego Natural History Museum Website: Kids' Habitat

**Professional Affiliations**

American Association of Museums

Visitor Studies Association

San Diego Evaluators Group

**Awards:**

American Association of Museums, Graphic Design Award of Merit, and (Two) Awards of Distinction, 1992

American Association of Museums, (Three) Graphic Design Awards of Distinction, 1991

American Federation of Art, Graphic Design Award, 1991

American Association of Museums, Graphic Design Award of Merit, 1989

Northwestern University Art Department, Departmental honors, 1986

Northwestern University College of Arts and Sciences research grant (visual arts), 1986

## Question #6: Project Team and Supporting Documents

EXEQUIEL EZCURRA, Ph.D.

**Professional preparation**

University of Buenos Aires, Natural Resource Management, Bachelor of Science 1973.  
 Instituto Venezolano de Investigaciones Científicas, Systems Science, Diploma 1974.  
 University College of North Wales, Ecology, *Magister Scientiae* 1978.  
 University College of North Wales, Ecology, *Philosophiae Doctor* 1984.

**Appointments**

President, National Institute of Ecology, Mexico, 2001 to present.

Deputy Director of Research and Collections, Director of the Biodiversity Research Center of the Californias, San Diego Natural History Museum, San Diego, CA, 1998 to present (on leave).

Director General of Natural Resources, National Institute of Ecology, Mexico, 1992 to 1994.  
 Principal Researcher, Centro de Ecología, Univ. Nacional Autónoma de México, 1987 to 1998.  
 Coordinator, Graduate Section in Ecology, Univ. Nacional Autónoma de México, 1990 to 1992.  
 Assistant Director, Instituto de Ecología, Museum of Natural History, Mexico, 1982 to 1986.  
 Principal Researcher, Instituto de Ecología, Museum of Natural History, Mexico, 1979 to 1987.  
 Research Assistant, Dept. of Natural Resources, Fundación Bariloche, Argentina, 1975 to 1977.

**Selected Publications****(i) Research papers most closely related to the proposed project**

Ezcurra, E., S. Arizaga, P.L. Valverde, C. Mourelle and A. Flores-Martínez. 1992. Foliole movement and canopy architecture of *Larrea tridentata* (DC.) Cov. in Mexican deserts. *Oecologia* 92:83-89.  
 Ezcurra, E., C. Montaña and S. Arizaga. 1991. Architecture, light interception, and distribution of *Larrea* species in the Monte Desert, Argentina. *Ecology* 72(1):23-34.  
 Briones, O., C. Montaña and E. Ezcurra. 1998. Competition intensity as a function of resource availability in a semiarid ecosystem. *Oecologia* (Berl.) 116:365-372.

**Additional Professional Experience**

- Scientific advisor, large format film focusing on Baja California and the Sea of Cortés, distributed worldwide through IMAX theaters
- Adjunct professor, Dept. of Biology, San Diego State University, 2000 to present
- Adjunct professor, Dept. Ecology and Natural Resources, Colegio de la Frontera (COLEF), Tijuana, 1999 to present
- Member, scientific advisory committee, County of San Diego, 1999 to present
- Co-editor of the revised version of classic book *Island Biogeography in the Sea of Cortés* (T. Case & M. Cody, 1992; U. of Cal. Press).
- Promoter of creation of California Condor release program in Baja California that involves collaboration among the Museum, San Diego and LA Zoos, and U.S. Fish and Wildlife Service, from the U.S. side, and the government of Baja California, UABC and CICESE (Ensenada), and SEMARNAP (Federal Secretary for the Environment), all from Mexico
- Member, steering committee of Coalition of the Gulf of California, alliance begun 1998 to promote joint cooperative efforts for conservation of Sea of Cortés and Baja California peninsula
- Leading member of several conservation organizations in Mexico, including the Directive Board of the Mexican Conservation Fund, the Technical Council governing Mexico's National Fund for Protected Areas, and the National Directive Board of Pronatura, Mexico's largest conservation NGO
- Developed the first systematic Environmental Impact Assessments in Mexico
- Coordinator of the Graduate Section in charge of the Doctorate in Ecology at the Universidad Nacional Autónoma de México (UNAM), 1990-1992
- Honored with the 1994 Conservation Biology Award by the Society for Conservation Biology for efforts to bring together ecological research and conservation, June 6, 1994
- Received several regional recognition awards from U.S. and Mexico for research and conservation

María Dolores Monterrubio Alvarez  
Playas de Tijuana, Baja California, c.p. 22200  
(66) 30 14 25

## ESCOLARIDAD

1993 a la fecha Educación para Maestros con énfasis en la Educación Ambiental;  
San Diego State University  
1988 Oceanología (2 semestres); Universidad Autónoma de Baja California.  
1984-1987 Centro Universitario Anglo Mexicano

## EXPERIENCIA

1993 a la fecha Directora de Entrenamientos para Maestros;  
Proyecto Biorregional de Educación Ambiental,  
Museo de Historia Natural de San Diego

1993 Coordinadora y Responsable del Programa del Curso Encuentro para el Enriquecimiento de Técnicas de la Enseña a través de la Educación Ambiental;  
Secretaría de Educación y Bienestar Social a través del XIV Ayuntamiento del Estado de Tijuana y Proyecto Bioregional de Educación Ambiental.

1992 Profesora de Inglés y Español. Nivel 1o de Secundaria;  
Colegio La Paz.

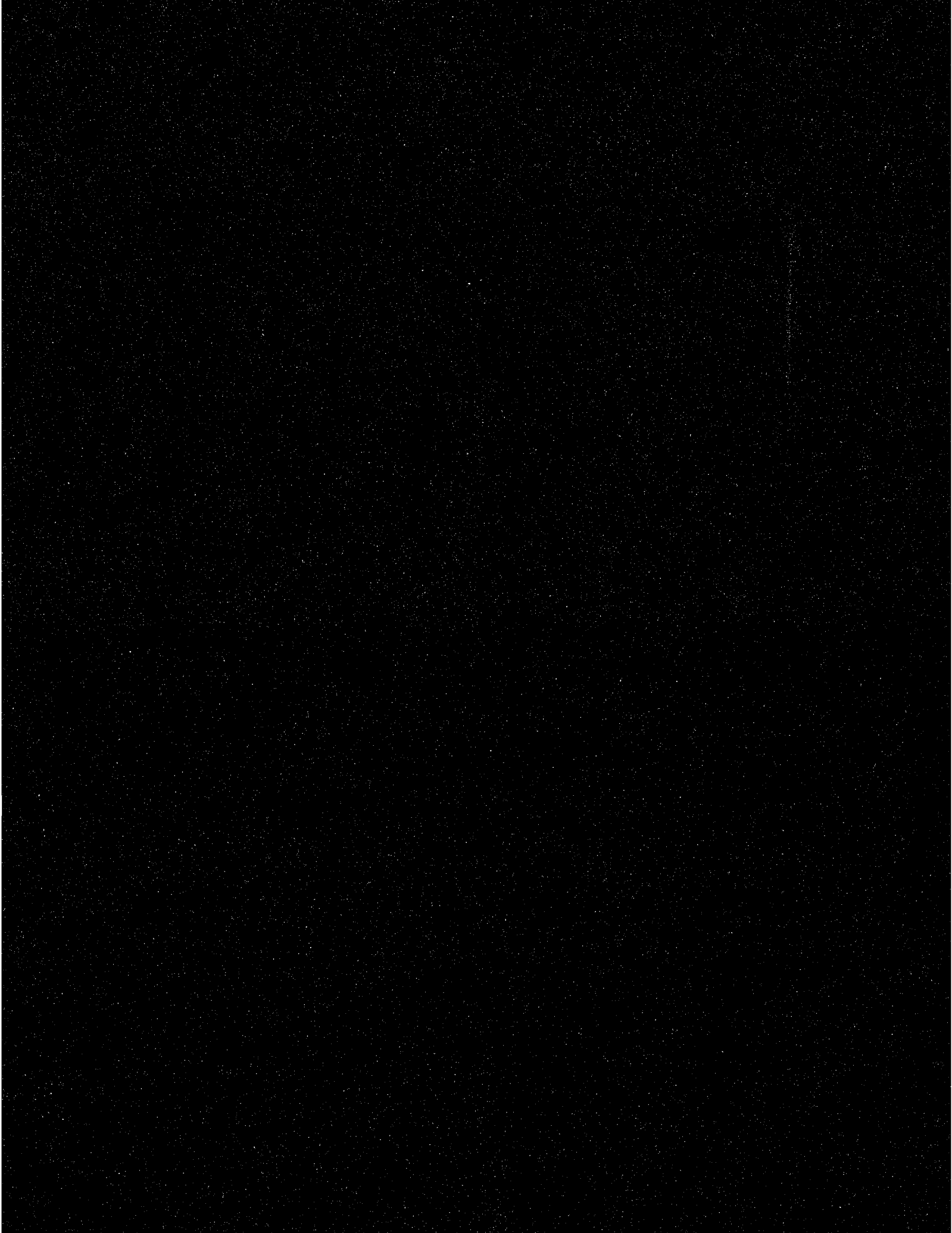
1987 - 1991 Coordinadora del Curso de Inmersión total en Español para profesores Extranjeros (1991);  
Instructora y Responsable del Programa del 4o nivel del Curso de Inmersión total en Español para Extranjeros y Coordinadora del Curso (1990);  
Instructora y Responsable del Programa del Curso Introducción a las Técnicas Básicas para la Enseñanza del Inglés como Segundo Idioma (1989 a la fecha);  
Profesora y Responsable del Programa del 2o nivel del Curso de Inmersión total en Español para Extranjeros dirigido a maestros de Estados Unidos (1989);  
Profesora de Inglés (1987-1990);  
Universidad Autónoma de Baja California.

1990-1991 Instructora y Responsable del Curso Técnicas para la Enseñanza del Inglés como Segundo Idioma (1991);  
Presidenta del comité de Seguimiento al Programa Piloto de Modernización Educativa (ingles) (1990-1991);  
Secretaría de Educación y Bienestar Social

1989 a la fecha Directora General, Instructora y Responsable del diseño de cursos dirigidos a maestros de idiomas y cursos de ingles a empresas;  
Sistemas Bilingues Especializados, S.C.

1988-1989 Instructora de Estructura de la Inteligencia y Juegos al Aire Libre;  
Instructora de Metodología de Estudio y Desarrollo de Habilidades del Pensamiento;  
SOI Sistemas de Enseñada.

1983-1987 Profesora de Inglés, Nivel Básico e Intermedio, Adultos, Adolescentes y Niños; Instituto Britannia.





## California Cultural and Historical Endowment Grant Application Face Sheet

Applicant Name:  
(Organization or Public Agency) Bay Area Electric Railroad Association

Applicant Address: 5848 State Highway 12  
Suisun City, CA 94585

Public Contact  
Regarding this Project: Phil M. Kohlmetz,  
Executive Director

Public Contact Telephone: 707-374-2978 x114  
Facsimile: 707-374-6742  
Email: philcoagogo@sbcglobal.net

Non-profit Organization Federal  
Employer Identification Number: 94-6115373

Name of Project:  
(Short Title) Car House Three Project

Project Amount:  
(Total Amount of Project) \$1,981,789

Amount you are Requesting from  
CCHE: \$310,520

Project Location:  
(indicate exact address,  
City and County) 5848 State Highway 12  
Suisun City, CA 94585

Anticipated Project Start Date: July 10, 2004  
(if you have already initiated your project, indicate that date)

Anticipated Completion Date: August 31, 2005

Location Latitude and Longitude: 38.206 N by 121.874 W

Website Address (if applicable) www.wrm.org

**Part One-CCHE Face Sheet**



Brief Project Description:(please use the space provided below)

The Bay Area Electric Railroad Association (BAERA) respectfully requests \$310,520 from the CCHE for the costs of construction of a new capital asset at the Western Railway Museum: the Car House Three Project. The Car House Three Project preserves and interprets the artifacts and heritage of California's vast network of electric railways, a significant 20<sup>th</sup> Century event that had a profound effect on our culture, economy, urban development, and history, and continues to shape our urban areas today.

BAERA was formed when rail preservationists and historians identified an unmet need and were compelled to act. Their donations of time and money saved thousands of irreplaceable artifacts from destruction and preserved the history of an era. Now, the most pressing need is permanent preservation (through appropriate storage) and ongoing interpretive displays and exhibits to enhance the public's understanding of this era (in general) and these artifacts (specifically).

Electric railways served the State, including San Diego, Los Angeles, Santa Ana, Santa Monica, Hollywood, San Bernardino, Santa Cruz, Monterey, Nevada City, Grass Valley, Stockton, Sacramento, San Francisco, Oakland, Hayward, Berkeley, Richmond, Oroville, Chico, Yuba City, Lodi, Petaluma, Santa Rosa, Sausalito, San Rafael, Colusa, Vallejo, Napa, and Calistoga. They were our first mass transit system. As migration from rural California to the cities increased, and the population exploded, electric railways facilitated the crucial expansion of our cities and urban areas. With affordable and reliable transportation, adjacent land could be developed into residential districts, making modern urban living possible and practical. They were (and continue to be) an integral part of Californians' everyday experience.

The Western Railway Museum has saved over 100 historic large electric rail artifacts (railcars) in its collection, and over 10,000 small artifacts (books, photographs, corporate records, documents, etc.). However, only 50 large artifacts currently enjoy appropriate storage; the remaining 50 are stored outside and are subject to the ravishing effects of wind, rain, sun, fire, and vandalism.

The Car House Three Project is an elegant solution that meets the needs for artifact preservation, protection, and public access. The facility will be equipped with state-of-the-art features for safety, security, and environmental control to provide the best practical preservation of the artifacts in the Museum's collection. In addition, the facility will be constructed to permit public accessibility and occasional operation of the rail equipment, in keeping with BAERA's mission for education of visitors and interpretation of early 20<sup>th</sup> Century California railroad history. As a result, a significant but underappreciated thread of California history, its electric railway heritage, will be shared in a meaningful way, and rare artifacts will be properly preserved in perpetuity.

**CCHE Use Only:**

Department Reference No.:

Bond:

Budget Year:

Award Date:

Type of Award:

Project Type:

# **Bay Area Electric Railroad Association**

## **Question 1: Project Description and Goals**

### **Project Description**

The Bay Area Electric Railroad Association (BAERA), a federally recognized 501(c)3 public benefit corporation that operates the Western Railway Museum in unincorporated Solano County, CA respectfully requests financial support from the California Cultural and Historical Endowment (CCHE) for the costs of construction of a capital asset at the Western Railway Museum: a new storage, display, and interpretation center, the Loring C. Jensen Memorial Car House (AKA Car House Three Project). The facility is named for the late Loring C. Jensen, past Chairman of BAERA and strong proponent of the project in the early planning stages, whose estate is providing a major share of the funding for this facility.

BAERA's mission is to preserve the regional heritage of electric railway transportation (trolleys, streetcars, light rail, and interurban trains) as a living resource for the benefit of present and future generations. By focusing our preservation and conservation efforts on *electric railways* and by focusing on *California*, we are able to better interpret the role electric railways played in the first half of the 20<sup>th</sup> Century, and fill a niche overlooked by other historical and cultural institutions.

With 6 tracks each 350 feet long, covering 38,000 sq. ft. of floor area, the Car House Three Project will be the largest display building at the Western Railway Museum and will enable us to provide proper storage for our entire collection of large artifacts (the historic railcars). This facility will be equipped with state-of-the-art features for safety, security, and environmental control to provide the best practical preservation of the artifacts in the Museum's collection. In addition, the facility will be constructed to permit public accessibility and occasional operation of the rail equipment, in keeping with BAERA's mission for education of visitors and interpretation of early 20<sup>th</sup> Century California railroad history.

The Car House Three Project is located on the existing 22-acre campus of the Western Railway Museum, owned and operated by BAERA since 1960. The expected useful life of the facility well exceeds 15 years. This project is a capital expense that will result in the permanent preservation of an existing collection.

The benefits of supporting this project are many, including:

- Protecting rare, one-of-a-kind California artifacts from the 20<sup>th</sup> Century.
- Preserving these artifacts for present and future generations.
- Increasing public appreciation of these artifacts and the role California's electric railway heritage played in our State's evolution.
- Enhancing the public's understanding of a significant but overlooked and under-appreciated aspect of California history and culture.

### **Project Goals**

These benefits will be achieved through the Car House Three Project's two interrelated and complimentary goals: permanent artifact preservation and improved interpretation.

Controlling temperature and humidity, using fire-rated building construction, installing a fire suppression system, and limiting sources of ultra-violet light will achieve artifact protection. This will serve to permanently preserve the artifacts in their current state. Public display and interpretation will be achieved by making the facility fully ADA compliant, by constructing viewing aisles between the tracks, allocating spaces for interpretative signs, displays, and other smaller artifacts, by scheduling docent-led tours through the facility, and by continuing to invite visitors to ride on our public railway. These activities all help visitors gain a deeper understanding and better appreciation of this unique thread of California's culture and history.

## **Bay Area Electric Railroad Association**

### **Question 1: Project Description and Goals**

As further described in Question 3, the heritage of electric railroads is important to preserve and interpret for many reasons. Electric railways served the State. They were our first mass transit systems, moving more people between 1900 and 1920 than automobiles, and moving more people in the first half of the 20<sup>th</sup> Century than their more popular cousins: the steam railroads. They were directly responsible for the development and expansion of our cities and suburbs, especially in the Los Angeles, Sacramento, and Greater San Francisco Bay areas. And although "light rail" is a growing part of modern California, their history is rapidly vanishing.

With the advent of electric railways in the early 20<sup>th</sup> Century as economical, clean, efficient transportation, for the first time, a person or family could live in one neighborhood, travel to another neighborhood for work, school, or shopping, and travel to a third place (such as the seashore, a ball park, or an amusement park) for recreation. In fact, the electric railroad companies built the first amusement parks as a way to increase ridership on weekends. Additionally, electric railways redefined how real estate would be developed and helped foster the exponential growth of America's cities and suburban areas.

The Western Railway Museum is the only place in California (or in the Western United States) that connects people to this continually evolving thread of our culture and history. We have amassed *the* definitive collection of electric railroad artifacts, both large and small. There simply is no other assemblage of such equipment, photographs, books, corporate records, and histories as comprehensive as ours. Our collection enables us to tell the story of electric railroads through a variety of displays and interpretive experiences.

Over 10,000 small artifacts (photographs, plate negatives, books, corporate records, publications, etc.) are stored in the climate controlled F.M. Smith Memorial Library and Archives. Displays in the newly completed Visitor Center such as "California Trolleys," "Transportation in Solano County," "The Key System and the Growth of East Bay Cities and Suburbs, 1903-1929," and "Suisun Bay: Sacramento Northern's Water Barrier" give visitors a broad overview of California and railroad history: how electric railways influenced social and economic development throughout the State and in our local region.

Of the 100 pieces in the large artifact (historic rail vehicle) collection, 25 artifacts are on display and open to the public in Car House One. Visitors can also have a hands-on experience by riding our public "demonstration" railway where we regularly operate a 10-mile round-trip through rural Solano County over the original Sacramento Northern right-of-way, using electric interurban cars native to California. Another 25 artifacts awaiting more serious conservation are stored in the Corrine Kluver Memorial Car House (Car House Two). The remaining fifty large artifacts are currently stored outside because of a lack of protected storage. We recognize that this is an unacceptable, and ultimately unsustainable manner of preservation.

In the same way that a curator at an art museum would display all the works of a particular period in one area, we will be able to display complete, actual trains inside the Car House from the major interurban companies that served Northern California (Sacramento Northern, The Key System, and Southern Pacific's Inter Urban Electric), both major San Francisco streetcar companies (Market Street Railway and MUNI), and (to help interpret the role electric railways played as compared to steam railroads) the last two remaining Western Pacific mainline freight and passenger trains.

All museums have a responsibility to provide the best possible care and protection to their collections, and to educate the public about the value and impact those collections represent. The Car House Three Project is an elegant solution to the real and immediate need to preserve the collections at the Western Railway Museum and to improve public understanding of California's electric railway heritage, now and in the future.

## **Bay Area Electric Railroad Association**

### **Question 2: Project Audience and Needs Assessment**

The Western Railway Museum serves a diverse cross-section of California residents. It also contributes to the State's travel and tourism industries, attracting 5000 out-of-state visitors annually. In the years before 2000, the Museum served approximately 10,000 people. Since the completion of our 12,000 sq. ft. Visitor and Archive Center in late 2000, we have consistently served 25,000 people annually, making us the largest cultural attraction in Solano County. We are highly focused on California history, and help people understand it by placing it in its proper historical context through displays, interpretation, and direct experience.

Surveys show that our audiences come from a variety of backgrounds:

- 25% are local **Solano County residents**, giving us a 1.5% "penetration rate" into Solano County households. In many ways, Solano County is a microcosm of California. With a 2003 (estimated) population of 412,336 people, Solano ranks 28<sup>th</sup> out of 58 counties statewide. 75% of the county is rural. Ethnic diversity of Museum visitors closely mirrors the County's and the State's with 58% White (49% County vs. 47% Statewide), 8% African American (15% County vs. 7% State), 13% Asian (13% County vs. 11% State), 12% Latino (18% County vs. 32% State), and 9% other (5% County vs. 3% State). Solano County per capita income is \$21,731 (vs. \$22,711 for the state) and average household size is 2.9 (vs. 2.87). Major employment sectors in the county include public protection and military service (at Travis Air Force Base) (41%), public assistance (25%) and health (16%). (Figures from 2000 Census data and Western Railway Museum surveys.)
- 25% come from the **East and North Bay regions** (Alameda, Contra Costa, Napa, Marin, and Sonoma Counties).
- 20% come from the greater **Sacramento** area.
- 10% come from the areas of the **State of California** not previously listed above.
- 20% are **out of state visitors**.
- 50% of our visitors are **school children**.
- 25% of our visitors are **seniors**.
- Over two-thirds of all visitors are **families** with at least one child under 14.
- When people come as a family, one-third of those family groups **span 3 generations**.

The Museum boasts 1500 annual dues-paying members. We also rely on approximately 100 people who volunteer over 2000 hours per month: the equivalent of more than 12 full time staff positions. We communicate with members through our newsletter *The Review*, published since 1947, now six times per year. Executive Director Phil Kohlmetz regularly makes presentations to local historical societies and community service groups (Rotary, Lions, Kiwanis, Chambers of Commerce) to recruit visitors, volunteers, and financial support.

In an effort to deepen our relationship with our local and statewide community, to promote the Museum's expanding services and operations, and to share this project with our audiences, we undertook five new and related activities this past summer: designing and printing a new brochure (Attachment 1), the creation of a DVD, a television marketing campaign titled "Experience Railroad History," the formation of a Community Advisory Panel, and the formation of a local Solano County Council of Museums.

The brochures were professionally designed to appeal to a broad audience of families, seniors, and vacationers. Fifty thousand were printed and are being distributed throughout the state. The DVD serves as an introduction to other groups, organizations, foundations, businesses and individuals. We hope to have it aired on local public access cable channels, and it is also offered for sale in the museum store.

## **Bay Area Electric Railroad Association**

### **Question 2: Project Audience and Needs Assessment**

“Experience Railroad History” is a 30-second ad running in surrounding communities that promotes our close proximity, educational, and recreational offerings. The ad is running at peak times on networks geared towards “families with children” (Animal Planet, Cartoon Network, ABC Family, and Nickelodeon) and networks that reach “lifelong learners” (Discovery, the Learning Channel, Food Network, A&E, and of course the History Channel). As a result, attendance has increased 7% over the same period in 2003.

Visitor surveys and comment cards show that the Museum is generally well regarded. Because there is always room for improvement, we formed a Community Advisory Panel this past June. Nine individuals representing the geographic, social, and economic diversity of Solano County are meeting monthly to help the Museum better understand its place in the community, improve its services, prepare for the final “public” phase of the current capital campaign for the Car House Three Project, and strategize on how to attract new audiences.

Finally, we are forming a countywide “museum coalition” with our neighboring institutions to better promote our county’s cultural resources to the general public, to our elected officials, and to educators. Two events coincided to start this group. First, County Supervisor John Vasquez recently asked each local museum to complete a survey to aid in his understanding of the cultural and historical resources of the county. Second, a chance meeting at the California Association of Museums conference: four Solano County Museums all happened to sit at the same table for lunch. The synergy of ideas was powerful. We co-led the first, exploratory meeting, and our second meeting is set for early December.

In the coming year, we will be redesigning our website, creating materials to specifically reach out to the business community, and repackaging our educational offerings to local area schools.

All of these efforts, including the construction of the new facility, are in service of two larger goals: to address the needs to connect people to each other and to their own past.

Many of America’s most treasured railroad, maritime, and aviation artifacts suffer from what author Carl Byron describes as “benign neglect.” Despite their initial salvation by well-meaning historians and enthusiasts, many “one-of-a-kind” artifacts are being left to die a slow, undignified death due to the ravaging effects of wind, rain, sun, fire, and vandalism. Even restored equipment suffers these same effects if not properly stored, maintained, or displayed. As the historic preservation community is quickly realizing, to simply save these one-of-a-kind artifacts from the scrap pile is not enough. They must be properly preserved *and* interpreted for the public.

BAERA was formed when rail and historic preservationists identified an unmet need and were compelled to act. Their donations of time and money saved thousands of irreplaceable artifacts from destruction and preserved the history of generation. Now, the most pressing need is permanent preservation (through appropriate storage) and ongoing interpretive displays and exhibits to enhance the public’s understanding of this era (in general) and these artifacts (specifically).

The Loring C. Jensen Memorial Car House Project will meet these needs for artifact preservation and protection, and for public access. As a result, a significant but often overlooked and underappreciated thread of California history, its electric railway heritage, will be shared in a meaningful and relevant way, and rare artifacts will be properly preserved in perpetuity.

# Bay Area Electric Railroad Association

## Question 3: CCHE Priorities

The Bay Area Electric Railroad Association's (BAERA) Car House Three Project directly addresses the priorities and purpose of the California Cultural and Historical Endowment (CCHE). As stated in the introduction to the CCHE grant application, "the CCHE is interested in... taking bold and broad steps into our past and present to look at all the pieces that have contributed to the success and leadership of California in the nation, and throughout the world." This project preserves and interprets the artifacts and heritage of California's vast network of electric railways, a significant 20<sup>th</sup> Century event that had a profound effect on our culture, economy, urban development, and history, and continues to shape our urban areas today.

Individually, each of the artifacts to be housed in the Car House Three Project added to the State's cultural, social, and economic evolution. Collectively, they enhance many important threads of California's story: economic growth, population expansion and shift, and the rise of the modern urban environment.

From the Turn of the Century to the Great Depression, electric railroads were *the* symbol of all things "modern." They were to the early 20<sup>th</sup> Century what the Internet was to the 1990's. Electricity had just been discovered and "tamed." New applications were found for it every day and using an electric motor to power a railroad was the latest, most novel idea.

Electric railroads were America's first successful mass transit system. Electric railways were the preferred mode of urban and interurban travel for many reasons. Electricity was economical, efficient, and environmentally friendly. Even in 1905, air quality was a concern for urban residents, and a big, dirty, loud, soot-spewing steam locomotive chugging down the middle of the street, rattling the windows was highly undesirable. Electric-powered trolley and streetcars were quiet, smooth, and non-polluting. They were especially useful at transporting large numbers of people comfortably over short distances, i.e. within cities and between cities. Cross country trips were still best handled by steam railroads, but trips between towns, and even between Sacramento and San Francisco, were faster and less expensive on an electric railroad.

Electric-powered streetcars and interurbans carried billions of people to work, to school, and to shop. They were also adept at hauling the State's freight, especially agricultural products such as eggs, butter, milk, produce, grain, beets, grapes, and livestock, as well as industrial and commercial products such as paper and steel. In some cases, freight moved by electric railways could be received the same day it was ordered, making electric railways the first "messenger service" and the predecessor to FedEx and UPS.

Economically, they represented a multi-billion dollar industry, generating previously unimagined wealth and prosperity for their passengers, their owners, land developers, the municipalities they served, and for the State. Other economic opportunities were created as residents from all over a region could easily get downtown to do their shopping (much in the same way that anyone around the world can go to amazon.com or eBay).

As significant events continued to unfold, such as increased migration to the cities and the continued American population explosion, electric railways facilitated the crucial expansion of our cities and urban areas. With affordable and reliable transportation, adjacent land could be developed into residential districts, making modern urban living possible and practical.

For the first time, you could live in one neighborhood, commute to another neighborhood for work or to shop, and travel to the ocean or a park on the weekends. People were no longer confined to live and work in the same place. Work, home, and social life changed forever.



## **Bay Area Electric Railroad Association**

### **Question 3: CCHE Priorities**

Electric railways made mass transit a reality. They made urban living possible. They were an integral part of people's everyday experience, and because of that, their preservation helps place other events in their proper context.

For all of their impact on early 20<sup>th</sup> Century history, the story of electric railroads is woefully underrepresented and rarely presented in a comprehensive fashion. Most other rail museums focus on either steam or diesel railroads. While many towns and counties have excellent historical societies that offer a local interpretation of significant events, none interpret this aspect of 20<sup>th</sup> Century history, and none do so on a statewide level. We are the only institution in California (as well as in the Western half of the U.S.) with this focus.

However, the Western Railway Museum's location in unincorporated Solano County presents formidable marketing and fundraising challenges.

Uniquely situated between two major urban areas, Solano County is a microcosm of California. The county straddles both the San Francisco Bay Area and the Central Valley. Solano boasts vineyards, mountains, farmland, the largest contiguous brackish (mixed salt and fresh) water wetland in the western United States (Suisun Marsh), a business friendly climate, and many other economic and recreational opportunities. At this time however, there is no coordinated marketing or outreach effort to promote the cultural and historical offerings of Solano County. BAERA did recently join the Fairfield Welcome Center Association, a group formed to explore a potential Welcome Center in nearby Fairfield that would promote countywide cultural, historical, and recreational opportunities, but that effort is in its infancy.

The lack of public awareness of the important role electric railroads played in California's history is also borne out in the lack of government, foundation, and corporate funding. The California State Railroad Museum in Sacramento, which focuses on steam and diesel railroads, receives state funds as part of Old Sacramento State Historic Park. The Western Railway Museum receives no state, federal, or local government funding. The County has no competitive granting program, and because the Museum is in unincorporated Solano County, we are unable to successfully solicit any of our neighboring municipalities for civic support.

Solano also receives less than its share of Federal grants. According to the 2000 census, Solano County ranks 28<sup>th</sup> out of 58 California counties with regard to population. Yet it received only 1.03% of all Federal funds and grants awarded to California in 2002.

Competitive grants from foundations are likewise scarce. Neither of the established philanthropic networks of San Francisco (and the Bay Area) and Sacramento (and the Central Valley) identifies Solano County as a geographic priority ("Survey of Current Needs" by the Great Valley Center, Spring 2000). On a recent search of the Foundation Center's database of the California organizations that fund museums or historical preservation, none list railroad museums as grant recipients. Only 6 foundations call Solano County home, and of those, 3 give only to pre-selected groups, and the fledgling Solano Community Foundation does not have a competitive granting program at this time. Only 2 corporations or foundations outside Solano County list Solano as a geographic priority.

Financial support from CCHE now will restore balance to the geographic distribution of funds, improve the educational, cultural, and historical resources of Solano County, and will preserve a significant part of California's history: its electric railway heritage.

# **Bay Area Electric Railroad Association**

## **Question 4: Ongoing Project Maintenance and Public Accessibility**

### **Ongoing Project Maintenance**

The Car House Three Project will be easily maintained, both operationally and financially, after it is completed because it will reduce annual maintenance needs at the Western Railway Museum.

Staffing will be easy to maintain after CCHE funds are exhausted because the Bay Area Electric Railroad Association (BAERA) has developed an extensive volunteer network to operate the Western Railway Museum and to oversee its projects. The Car House Three Project is no exception. Qualifications of the Project Team can be found in Question 6. The only CCHE funds that are directed towards staff salaries are directly project related, and will not be required after the completion of the Car House Three Project.

One hundred Museum volunteers meet every Wednesday and Saturday to perform regular maintenance and upkeep on the buildings, equipment, artifacts, and grounds. This includes landscaping, grounds keeping, janitorial, building maintenance, track maintenance, artifact conservation, artifact restoration, and overhead wire repair. Many bring professional expertise as civil, mechanical, and electrical engineers, building inspectors, carpenters, mechanics, electricians, and project managers to their volunteerism at the Museum. Our Museum has a 44-year history of performing these tasks and teaching others who express interest. Volunteers clean and maintain equipment used in the demonstration railway operation, from cleaning windows to inspecting brakes to lubricating axles. Volunteers also participate in "Maintenance Week," held yearly during the final full week of May. All restored artifacts visit the restoration shop for a complete "check-up." Problems are identified and remedied immediately, eliminating our exposure to deferred maintenance issues arising in the restored artifacts, and other buildings.

As you will see in Question 6: Project Team, the key project personnel are leading professionals, each with literally dozens of years of experience in their field. With the exception of the general contractor, the Executive Director, and the two County Supervisors serving on the capital campaign committee, all are volunteers that have each been department heads for more than 6 years, and have all served multiple terms on the Board of Directors. These same people have been leaders at BAERA long before this project was conceived, have capably led the project to its present state, and will continue to serve the organization long after this project is complete. Additionally, BAERA is conducting a long-range strategic planning retreat in February 2005, to address the issues of future project prioritization, continued volunteer and member recruitment, long-term personnel succession planning, and increased external relations.

Regular operating expenses will only be minimally impacted by this capital project. However, major long-term cost savings will be seen in our conservation and restorations budgets.

Twenty-Five large artifacts (railcars) are currently on display for the public in Car House One. Another twenty-five artifacts awaiting restoration are conserved in the Corrine Kluver Memorial Car House (Car House Two). Because these fifty artifacts are covered and given a level of protection from sunlight, rain, and wind, they are easily maintained and conserved during Maintenance Week.

The remaining fifty large artifacts are currently stored outside. Although initially saved from the scrap heap and the blowtorch, they are now subject to the ravaging and deteriorating effects of wind, rain, sun, extremes of temperature, vandalism, theft, and fire. Our current preservation efforts include covering them with large tarps

# **Bay Area Electric Railroad Association**

## **Question 4: Ongoing Project Maintenance and Public Accessibility**

and periodic painting. We recognize that this is an unacceptable, and ultimately unsustainable manner to address maintenance.

The construction of the Car House Three Project will provide superior artifact protection: items placed in the facility will essentially be placed in stasis. With the deteriorating effects of exposure to wind, rain, and sun eliminated, the Loring C. Jensen Memorial Car House itself will be one of our most significant efforts to address deferred maintenance.

The project is a natural extension of the Museum's current activities, and not a wholly new program. Operationally, it requires only one additional volunteer per day (to lead guided tours) and basic weekly janitorial service. As such, it will not precipitate the massive change in expenses or operations that is often experienced by organizations undertaking a major capital project such as this. The operation, management, and maintenance of the museum's public demonstration railroad constitute the largest annual operating expenses (approximately 30% of total expenses). Current utility and building maintenance costs for the Museum's existing facilities constitute only 5% of the annual operating budget. Utility costs for the new facility will be kept low because the public's interaction with the display building will be so carefully guided. Utility costs for the project will be limited to small amounts of electricity when visitors are on guided tours and for the ventilation system. We project annual building maintenance costs of \$15,000, roughly the amount we currently spend on conserving artifacts stored outside: a expense that will be eliminated upon completion of the Car House Three Project.

The project will have an even more positive effect on the organization's long-term conservation and restoration budgets, and will drastically reduce future maintenance costs. Currently, the organization spends between \$50,000 and \$250,000 on each major conservation project. These projects take between one and five years to complete. To date, we have conserved or restored 50 large-scale historic artifacts, with another 50 items awaiting attention. Given current storage conditions, these conservation projects have a "life-expectancy" of 50 years when completed. For example, when we restore a rail car, we expect that restoration to last for 50 years given our current storage conditions, after which time, a further restoration will be required to preserve the item.

Artifacts stored in the Loring C. Jensen Memorial Car House will have, for all practical purposes, an unlimited "life expectancy." With temperature, humidity, fire, and vandalism eliminated as threats to the artifacts, they will remain in a static state, "frozen in time" so to speak. Restored railcars will remain restored, and deterioration will be effectively stopped or "frozen" in items that show signs of deterioration.

While it is difficult to put an exact dollar figure on these long-term conservation savings, and while much of our large-artifact collection (50 items) still requires serious attention, we will eliminate the future financial and human resource burden of duplicating expensive conservation work previously performed. Additionally, we will eliminate \$15,000 spent annually trying to simply stabilize artifacts awaiting restoration but currently stored in less than ideal conditions (i.e., out-of-doors).

The Solano County Department of Environmental Management found no significant adverse environmental impacts as a result of the Car House Three Project and issued a Negative Declaration. A copy of the Negative Declaration is included in "Attachment 1: Visual Description of the Project," and copies of the Review Committee's Meeting Minutes, Notice of Public Comment Period, Notice of Completion, and Parts 1 and 2 of the Initial Study are available upon request.

## **Bay Area Electric Railroad Association**

### **Question 4: Ongoing Project Maintenance and Public Accessibility**

#### **Public Accessibility**

All public facilities at the Western Railway Museum are fully accessible to all Californians and meet or exceed the standards of the American Disabilities Act (ADA). BAERA has a coordinated plan to promote the Museum and this new facility.

The Western Railway Museum is open year-round every weekend from 10:30am – 5:00pm. Additionally, from Memorial Day to Labor Day, the Museum is open Wednesday through Sunday from 10:30am – 5:00pm. Admission is very affordable, just \$8 for adults, \$7 for seniors, and \$5 for kids ages 2-14. Admission is “all-inclusive” and includes access to all public buildings (including the Visitor Center, Library, and Car House One), free parking, use of the 1.5-acre shaded picnic grounds, and unlimited train rides. Mid-week tours are provided for school and senior groups who give us two weeks advance notice.

Visitors often comment on our affordability, and ask if we receive government grants to offset operating costs. In fact, we receive no government operating support, and are able to remain affordable thanks to the contribution of thousands of volunteer hours from people who live as far away as San Francisco, Sacramento, Stockton, and Santa Rosa. We realize that for many people, affordability is a key-determining factor in where they spend leisure or recreational time. We are proud that we are an affordable option for families, seniors, and tourists and strive to maintain this position. As such, an additional charge will not be assessed for entrance to the new facility when complete. Access will be provided by a free, daily, docent-led guided tour.

Not only are our facilities accessible and affordable, BAERA has recently undertaken a number of new initiatives to involve our local communities, partner with local (school, service, and non-profit) agencies, and invite more civic participation in our efforts to preserve and interpret history.

Our most successful and popular collaboration is our annual Pumpkin Patch Festival produced in partnership with the Shiloh Church Restoration Committee and the Rio Vista Museum. For the past six years, the Western Railway Museum has run special “Pumpkin Patch Trains” for the three weekends before Halloween. Families arrive at the Museum and take a five-mile ride aboard one of the Museum’s accurately restored historic streetcars, through the Solano countryside to a shaded eucalyptus grove. There, volunteers from Birds Landing, Collinsville, Rio Vista, the (volunteer) Montezuma Fire District and the local Solano County farming community create a Pumpkin Patch complete with a hay bale fort for kids to play on, hay rides, a wheat field maze, live music, animals to pet, homemade baked goods and crafts, stunning views of Mt. Diablo, and of course, pumpkins for sale at popular prices.

All revenue from the Pumpkin Patch supports the Western Railway Museum and the restoration of the non-denominational Shiloh Church (an important historic building that is adjacent to our rail line and acknowledged by our docents in the oral history they present to visitors). In addition, the Museum donates a portion of its Pumpkin Patch admissions to the citizens’ restoration efforts.

The Museum has a positive relationship with Travis Air Force Base in Fairfield, CA. In 1946, the federal government relocated the original Sacramento Northern railroad right-of-way to accommodate the expansion of the Base. As a result, the government granted the railroad (and its successors, i.e. BAERA) a perpetual use easement for the new railroad right-of-way that it owns. In cooperation with Congresswoman Ellen Tauscher’s

# **Bay Area Electric Railroad Association**

## **Question 4: Ongoing Project Maintenance and Public Accessibility**

office, we are beginning to transfer the property to BAERA outright. This is proceeding with the favorable participation of Travis Air Force Base.

We collaborate with the Solano Water Quality Agency on an ongoing water-monitoring project. We have negotiated fifteen use- and crossing-agreements that provide significant rental income with companies such as Chevron, Calpine Energy, and Sprint Telecommunications, private individuals, and public utilities, including Pacific, Gas & Electric and Citizens Communications Company.

We also partner with other museums to trade labor and knowledge. Each fall, we “swap” volunteer labor with the California State Railroad Museum in Jamestown to assist with major maintenance work. To better promote our county’s cultural resources to the general public, to our elected officials, and to educators, we are forming a countywide “museum coalition” with our neighboring institutions. Outcomes from this effort will include an annual mailing to all K-12 schools in the county promoting our museums’ educational offerings and describing how they specifically help teachers address California State Standards for History/Social Science at each grade level.

We formed a Community Advisory Panel in June 2004. The role of the Advisory Panel is to:

- Help the Museum better understand how it is currently perceived in the community.
- Suggest practical ways the Museum can be more successful overall, and improve its image.
- Develop a community outreach/communication plan to better integrate the Museum with the community.
- Identify potential funding prospects and supporters for the Museum’s new facility.
- Introduce the Museum to influential groups and individuals

To date, nine individuals representing the geographic, social, professional, and economic diversity of Solano County are meeting monthly to help the Museum better understand its place in the community, improve its services, and prepare for the final “public” phase of the current capital project.

BAERA is also part of the Fairfield Welcome Center Association, a group formed to explore a potential Welcome Center in nearby Fairfield that would promote countywide cultural, historical, and recreational opportunities.

To ensure the success of the Loring C. Jensen Memorial Car House Capital Campaign, we actively sought to create as diverse a committee as possible. We have strong geographic diversity (including San Francisco, Sacramento, Oakland, and Solano County: Vallejo, Fairfield, and Suisun City), age diversity (from 34 to 74), ethnic diversity, and professional diversity in the fields of railroad- and historic-preservation, philanthropy, transportation, legal, religion, and (local, county and state) government. We are especially proud that two of the five Solano County Supervisors have agreed to serve on the Committee.

By involving the local community, increasing public awareness, appealing to a large and diverse public audience, and remaining affordable, BAERA will improve the educational, cultural, and historical resources of Solano County through improved education and interpretation, increased patronage, increased local tourism, and increased philanthropy.

**Bay Area Electric Railroad Association**

**Question 5: Tasks, Budget and Matching Requirement**

Task description	Task budget	Itemized list of all the sources of funding used to complete the task	CCHE funding	1:1 Matching funds	Matching funds notes	Deliverables
<b>PLEASE NOTE:</b> This budget lists <u>all</u> tasks and budget items associated with the Car House Three Project. Because we are only requesting CCHE support for selected tasks, only those specific tasks for which we will use CCHE funds are listed in the "CCHE funding" column.						
On page 8, total amounts are listed for: 1) cost of the project, 2) all other sources of funding (i.e., non CCHE and non-match funding)						
3) total funding requested from CCHE, 4) the fulfillment of the 1:1 match requirement						
Task budget amounts are inclusive of construction management and general conditions (i.e., elements that are incidental but directly related to the project), and are based on our signed contract with Lyons Construction of Oakland.						
<b>PROJECT MANAGEMENT</b>						
Museum Project Oversight	\$ 9,900		\$ 4,950.00	\$ 4,950.00	Funds from the Elliott R. Donnelley Family Trust	Museum Employee's time spent managing project going forward after CCHE grant agreement is signed, calculated at 33% of 1FTE for 6 months, annual salary and benefits of \$60,000, and based on work previously completed
Contingency	\$ 66,170	Portion of construction loan from Bank of Rio Vista				Protects project and Museum from unforeseen project changes or obstacles



**Bay Area Electric Railroad Association**  
**Question 5: Tasks, Budget and Matching Requirement**

Task description	Task budget	Itemized list of all the sources of funding used to complete the task	CCHE funding	1:1 Matching funds	Matching funds notes	Deliverables
<b>PRELIMINARY WORK</b>						
Submittals/fabrication	\$ 27,600	Portion of Jensen Estate				Design and mechanical specifications of building and building items (such as electrical, ventilation, access, fixtures, etc.) for Museum review and approval
General Survey, Mobilization, Layout Building Pad, Site Clearing, Rough Grading	\$ 51,900	Portion of Jensen Estate				Vehicles and necessary equipment brought on site, Site prepared for building foundation
<b>BUILDING FOUNDATION</b>						
Footing Layout, Excavation, Formwork, Concrete Pours, Embeds	\$ 241,566	Portion of Jensen Estate				Concrete foundations and footings complete for main display building, pump house and 200,000 gallon water tank

**Bay Area Electric Railroad Association**  
**Question 5: Tasks, Budget and Matching Requirement**

Task description	Task budget	Itemized list of all the sources of funding used to complete the task	CCHE funding	1:1 Matching funds	Matching funds notes	Deliverables
<b>STRUCTURE AND EXTERIOR FINISH</b>						
Varco-Pruden Pre-Engineered Metal Building	\$ 275,000	Portion of Jensen Estate				Materials for pre-fabricated metal building
Erect Main Frames and Secondary Frames	\$ 99,720	Portion of Organizational Set Aside Funds				Building frame completed and ready for painting
Painting	\$ 99,553	Portion of Organizational Set Aside Funds				Interior frames painted for longevity
Install Wall Covering	\$ 222,370	Portion of construction loan from Bank of Rio Vista				Installation of main walls
Install Six Rail Car Doors	\$ 93,075		\$ 46,537.50	\$ 46,537.50	\$5894.5 matched by portion of donated labor to install rail, \$40643 matched by Jensen Fund	Helps complete a weatherproof environment for the artifacts and permits movement of artifacts between display buildings

**Bay Area Electric Railroad Association**  
**Question 5: Tasks, Budget and Matching Requirement**

Task description	Task budget	Itemized list of all the sources of funding used to complete the task	CCHE funding	1:1 Matching funds	Matching funds notes	Deliverables
Doors, Frames & Hardware	\$ 18,240		\$ 9,120.00	\$ 9,120.00	Fully matched by Jensen Fund	Public entrance and exits to building. Provides climate controlled environment for artifacts and safe passage of volunteers and visitor through building
Gutters & Rain Water Leaders	\$ 14,700		\$ 7,350.00	\$ 7,350.00	Fully matched by Jensen Fund	Provides collection and distribution of roof water run off into approved storm system, further preventing erosion
Install Roof Covering	\$ 77,221		\$ 38,610.50	\$ 38,610.50	Fully matched by Jensen Fund	Helps complete a weatherproof environment for the artifacts
Sheet Metal Flashing	\$ 6,559		\$ 3,279.50	\$ 3,279.50	\$2586.5 matched by portion of donated labor to weld rail bonds, \$693 matched by Jensen Fund	Completes weatherproof building by sealing all joints, prevents water filtration into building.

**Bay Area Electric Railroad Association**  
**Question 5: Tasks, Budget and Matching Requirement**

Task description	Task budget	Itemized list of all the sources of funding used to complete the task	CCHE funding	1:1 Matching funds	Matching funds notes	Deliverables
<b>SITE WORK</b>						
Under Ground Fire Line Piping	\$ 110,198	Portion of construction loan from Bank of Rio Vista				Trenches dug for pipes to carry water from 200,000 gallon water tank to building sprinkler system and fire hydrants throughout the Museum campus
Install Storm System, C.O. #5	\$ 43,237	Portion of construction loan from Bank of Rio Vista				Provides collection and distribution of water run off into approved storm system, further preventing erosion
Moisture Barrier & Backfill Pad	\$ 42,150	Portion of construction loan from Bank of Rio Vista				Moisture barrier installed to prevent unwanted ground moisture for entering the facility
Grading, Fire Roads, Pave Roads and Paths	\$ 139,922	\$67885 from construction loan from Bank of Rio Vista	\$ 36,018.50	\$ 36,018.50	Fully matched by Jensen Fund	All weather fire road completed, and exterior pathways ADA compliant
Construct Pump House, Install Fire Pump & Tank	\$ 46,200	\$6200 from construction loan from Bank of Rio Vista	\$ 20,000.00	\$ 20,000.00	\$12,200 from Public Safety Fund, \$7800 from Jensen Fund	Fire pump and 200,000 gallon water tank installed for fire suppression system, an integral part of fire suppression system to protect life and property

**Bay Area Electric Railroad Association**

**Question 5: Tasks, Budget and Matching Requirement**

<b>Task description</b>	<b>Task budget</b>	<b>Itemized list of all the sources of funding used to complete the task</b>	<b>CCHE funding</b>	<b>1:1 Matching funds</b>	<b>Matching funds notes</b>	<b>Deliverables</b>
Form, Place and Finish Interior Flatwork and Exterior Concrete Landings	\$ 69,291	\$7200 from construction loan from Bank of Rio Vista	\$ 31,045.50	\$ 31,045.50	fully matched by portion of donated labor to install track	Building interior fully ADA compliant, safe passage for work personnel, volunteers, and visitors
<b>INTERIOR CONSTRUCTION</b>						
Fire Sprinklers	\$ 66,400		\$ 33,200.00	\$ 33,200.00	fully matched by portion of Public Safety Fund	Sprinklers installed, a key component in the fire suppression system to protect life and property
Electrical Power, Distribution, Lighting, and Trim	\$ 67,417		\$ 33,708.50	\$ 33,708.50	\$33147 matched by portion of donated labor to install overhead trolley wire, \$561.5 matched by portion of donated labor to weld rail bonds	Interior building power distributed for safe exiting in event of an emergency, small artifact displays, proper illumination for large artifacts, and main aisle lights

**Bay Area Electric Railroad Association**  
**Question 5: Tasks, Budget and Matching Requirement**

Task description	Task budget	Itemized list of all the sources of funding used to complete the task	CCHE funding	1:1 Matching funds	Matching funds notes	Deliverables
<b>RAIL AND OVERHEAD TROLLEY WIRE CONSTRUCTION</b>						
Purchase 12 wooden utility poles at \$400/pole	\$ 4,800		\$ 2,400.00	\$ 2,400.00	fully matched by portion of donated labor to install overhead trolley wire	Support system for overhead electric power distribution enables electric car operation
Purchase 3000' copper wire and hardware for overhead trolley power system @ \$1.50/ft.	\$ 4,500		\$ 2,250.00	\$ 2,250.00	fully matched by portion of donated labor to install overhead trolley wire	Provides power to overhead electrical trolley wire (i.e., power distribution system)
Purchase 600 tons of rock ballast @ \$20/ton	\$ 12,000		\$ 6,000.00	\$ 6,000.00	fully matched by portion of donated labor to install track	Ballast is a necessary component to track construction, it helps prevent moisture from rotting the ties
Purchase 1500 wooden ties @ \$30/tie	\$ 45,000		\$ 22,500.00	\$ 22,500.00	fully matched by portion of donated labor to install track	Ties bind the rail together, and are a necessary component to track construction
Purchase 6000' of Steel Rail (weighing 85 tons) @\$200/ton	\$ 17,000		\$ 8,500.00	\$ 8,500.00	Fully matched by Jensen Fund	Rail is a necessary component to track construction, and enables us to store rail artifacts in the building



**Bay Area Electric Railroad Association**

**Question 5: Tasks, Budget and Matching Requirement**

<b>Task description</b>	<b>Task budget</b>	<b>Itemized list of all the sources of funding used to complete the task</b>	<b>CCHE funding</b>	<b>1:1 Matching funds</b>	<b>Matching funds notes</b>	<b>Deliverables</b>
<b>PROJECT CLOSEOUT</b>						
Fire System Testing	\$ 2,850		\$ 1,425.00	\$ 1,425.00	Fully matched by Jensen Fund	Fire system certified by State Fire Marshall that system is suitable for protection of life and property. Training for Museum personnel to ensure proper system maintenance.
Final Clean Up	\$ 1,750		\$ 875.00	\$ 875.00	Fully matched by Jensen Fund	Building suitable and ready for final inspections
Final Inspections	\$ 1,000		\$ 500.00	\$ 500.00	Fully matched by Jensen Fund	Certificate of Occupancy from County that building meets all current code requirements and is safe for artifacts and people.
Record Drawings, Operations and Maintenance Manuals	\$ 2,000		\$ 1,000.00	\$ 1,000.00	Fully matched by Jensen Fund	Receipt by Museum of all building documentation to ensure prolonged use of building
Punch List Items	\$ 2,500		\$ 1,250.00	\$ 1,250.00	Fully matched by Jensen Fund	Opportunity for Museum to make observation of any general construction defects that need to be remedied by general contractor
<b>TOTAL EXPENSES</b>	<b>\$ 1,981,789</b>	<b>\$ 1,360,749</b>	<b>\$ 310,520</b>	<b>\$ 310,520</b>		

**Bay Area Electric Railroad Association**  
**Question 5: Tasks, Budget and Matching Requirement**

SOURCES OF FUNDING		Amount	Status			
Organizational funds set aside from admissions since 1997.		\$ 215,874	Committed			
The Estate of Loring C. Jensen		\$ 600,000	Committed			
Public Safety Fund: donations from 112 individuals and 3 corporations, raised from 07/09 - 09/04		\$ 45,400	Committed			
Jensen Fund: donations from 239 individuals, 8 corporations, and the Elliott R. Donnelley Family Trust to the Car House Three Project, raised from 02/97 - 09/04		\$ 209,994	Committed			
Loan from Bank of Rio Vista		\$ 600,000	Committed			
CCHE Funds		\$ 310,520	Pending			
TOTAL INCOME		\$ 1,981,788				

**Bay Area Electric Railroad Association**  
**Question 5: Tasks, Budget and Matching Requirement**

Non Cash (In Kind) Donation of Labor for Matching Requirement. Labor supplied by Western Railway Museum volunteers.	\$ 106,385					
Install overhead trolley wire for the Car House Three Project, including poles, hardware, and copper wire	\$ 37,797				6 person crew, working 17, 8-hour days, prevailing wage of \$46.32/hr. per Employment Development Department, Director of Industrial Relations (www.dir.ca.gov)	
Install 3000' of track	\$ 65,440				3000' ft of track built for Car House Three Project permits large artifact storage. 12 person railroad construction track crew at \$32.49/hour, plus 2 operating engineers at \$45.65/hr, each working 17, 8-hour days, prevailing wage determined by Employment Development Department, Director of Industrial Relations (www.dir.ca.gov)	
Weld rail bonds	\$ 3,148				Rails sections bonded together, and usable for large artifact storage. 1 welder, working 12, 8-hour days, prevailing wage of \$32.79/hr. determined by Employment Development Department, Director of Industrial Relations (www.dir.ca.gov)	

# **Bay Area Electric Railroad Association**

## **Question 6: Project Team and Supporting Documents**

### **Executive Director Phil Kohlmetz**

Mr. Kohlmetz has spent his entire thirteen-year professional career working to strengthen community-focused, non-profit organizations.

After a statewide search, The Bay Area Electric Railroad Association hired its first professional staff member, Executive Director Phil Kohlmetz in November 2003. Responsible for improving community relations, fund raising, and marketing, Mr. Kohlmetz is redefining the public's perception of the Museum as a place of discovery, wonder, and enjoyment. TV ads and feature segments, redesigned promotional materials, increased involvement from both elected officials and the local community, and improved customer experiences are evidence these efforts are paying off.

Since his date of hire, he has initiated new, coordinated marketing and outreach efforts, including redesigning the Museum's primary marketing tools (brochures, website, press releases), creating a promotional DVD, conducting visitor surveys, creating a Community Advisory Panel, convening a Solano County Council of Museums, and promoting the Museum to local schools, service groups, and on national television.

For this capital project, Mr. Kohlmetz is responsible for project financing, fundraising, and public relations, and shares responsibility for overall project management. Using his planning, business, interpersonal, and communications skills, he has developed all campaign materials, responded to numerous media requests concerning the project, and solicited eleven additional volunteers to serve as a Capital Campaign Committee, including long-time members, donors, and board members of the organization, prominent community members, a two Solano County Supervisors. To ensure the timely progress of this critical project while the fund raising strategy is executed, he negotiated and secured a \$900,000 construction loan from the Bank of Rio Vista, a 100 year old, locally owned and operated financial institution.

As Development Director for the San Francisco Shakespeare Festival, a 20-year old \$1.5M professional theatre dedicated to making the arts accessible to all, he raised \$900,000 annually from 2000 to 2003 in contributed funds to support the *Free Shakespeare in the Park* program and led an expansion of the company's three integrated arts education programs. As Managing Director of Chicago's Roadworks Productions from 1995 to 2000, he reestablished the board of directors and successfully led a five-year strategic planning process and identity campaign. The company emerged with a highly focused mission (to develop the next generation of theatre patrons), and its audience and revenues doubled.

He served for three years as a panelist at the League of Chicago Theaters' Annual Retreat, served on both the League's Marketing and Finance committees, completed the National Arts Marketing Project sponsored by the Arts Marketing Center, and was awarded the Arts Management Excellence Award from the Arts and Business Council of Chicago. He currently serves on both the City of Vallejo's Commission on Culture and the Arts, and the Vallejo Community Arts Foundation's Granting Sub-Committee.

Mr. Kohlmetz studied at the University of Illinois at Urbana-Champaign and at Manchester University in England, completing degrees in Psychology and Music. He currently owns a home in Vallejo, CA.

# Bay Area Electric Railroad Association

## Question 6: Project Team and Supporting Documents

### The Bay Area Electric Railroad Association

The mission of the Bay Area Electric Railroad Association (BAERA) is to preserve the regional heritage of electric railway transportation as a living resource for present and future generations. We promote:

- The study of electric railways, their physical equipment, properties, and operations in Northern California and throughout the Western United States.
- The procurement and preservation of historic electric railway equipment, materials and property (including freight and passenger vehicles, photographs, documents, collections, rights-of-way, and related materials and artifacts).
- The display and interpretation of surviving historic equipment, materials, and property.

**By focusing our preservation and conservation efforts on *electric railways* and focusing on *California* and the *Western United States*, we are able to better interpret the artifacts for the public, and fill a niche often overlooked by other historical and cultural institutions.**

Our core Electric Railway Collection has three primary geographic foci: the Greater San Francisco Bay Area, California, and the western United States. In addition, our Western Pacific Steam Era Collection contains complete steam freight and passenger trains, including the last two remaining Western Pacific mainline steam freight and passenger engines, locomotives #94 and #334, both native to California

BAERA began as a result of a streetcar excursion in Oakland. When the attendees discovered that the car they had chartered was to be scrapped within a matter of days, they literally “passed the hat” and immediately generated \$200 to buy the car and save it from destruction. It was in this spirit of historic preservation and philanthropy that the Bay Area Electric Railroad Association was established in September 1946.

Today, the organization boasts 1500 annual dues-paying members, and 100 weekly volunteers who operate BAERA’s *Western Railway Museum*. The Western Railway Museum is BAERA’s principal project and serves 25,000 visitors annually. The organization has no outstanding debt, and has established an endowment of \$180,000. Additional board- and donor-restricted funds for special projects total \$820,000. Annual operating revenues exceed \$350,000 and the organization has a balanced budget.

BAERA has a long track record of successfully completing major capital projects such as the Car House Three Project. Over the organization’s 58-year history, Californians have volunteered over 1,000,000 hours, and donors worldwide have contributed \$8,525,000 to transform a 22-acre grazing field in rural Solano County into one of the world’s foremost transportation museums. Their collective efforts have resulted in:

- Preserving 100 large electric rail artifacts (railcars) and 1000’s of small artifacts (books, photos, etc.)
- Laflin Park: a 1.5-acre shaded *picnic area* for visitors with tables and benches.
- Car House One: a 25,000 sq. ft. covered *display area* for 25 historic, restored cars.
- Corrine Kluver Memorial Car House: a 14,000 sq. ft. covered *storage facility* containing large artifacts awaiting restoration.
- Restoration and Maintenance Shop: a 12,000 sq. ft. *complete wood and metal shop*
- Visitor and Archive Center: 12,000 sq. ft. of exhibit space, retail, and climate controlled archives
- Rehabilitation of 5 miles of the historic Sacramento Northern Railway to enable visitors to experience, first-hand, what it was like to ride these historic machines.

**Bay Area Electric Railroad Association**  
**Question 6: Project Team and Supporting Documents**

**W.E. Lyons Construction Co.**  
**General Contractor**

W.E. Lyons Construction has been in business since 1926. Owned and managed by the Lyons family for three generations, the company survived the great depressions and a world war by providing customers with excellent service and quality construction at a reasonable cost. Lyons is a medium sized firm with a relatively flat organizational structure, making them affordable and flexible. 75% of their clients come back to Lyons to work on multiple projects. Although still based in Oakland, CA, they service clients in six western states.

Lyons business model involves "project sponsorship" whereby one of the company's principals is directly involved in every project they undertake. Principals bring prospective project to the table and if the company decides to take a new client, that principal takes ultimate responsibility for the successful completion of that client's project.

Lyons was chosen as the general contractor for the Western Railway Museum's Car House Three Project because of their experience with pre-fabricated metal buildings and their strong design-build capabilities. By taking the time up front to design and engineer a facility that met the dual needs of artifacts (preservation) and the public (access), costly changes have been avoided and time has been used efficiently. This is especially important, as the need to begin certain phases of construction before the winter "rainy" season was a crucial factor. Thanks to their ability to accurately budget time and expenses, time critical work can move forward without jeopardizing the project's available funding streams.

# **Bay Area Electric Railroad Association**

## **Question 6: Project Team and Supporting Documents**

### **Project Manager Joel Cox**

**Manager – Civil and Structural Engineering, Capital Corridor Joint Powers Authority**

Joel Cox serves as Project Manager for the Loring C. Jensen Memorial Car House Project. Joel is responsible for coordinating the design and construction contracts for this project. In this capacity, Joel is responsible for managing the project's scope, schedule, and budget; for reviewing and approving contractor invoices; and for reporting to the Association's Board of Directors on project progress. Joel is well equipped to perform this work, through his years of experience in Engineering Project Management.

Joel holds both Bachelor's and Master's degrees in Civil Engineering, and is a registered Professional Engineer in the State of California. He has worked for over 10 years for various railroads. He currently holds the position of Manager – Civil and Structural Engineering for the Capital Corridor, the firm that operates Amtrak's passenger service between San Jose, CA and greater Sacramento. In that capacity he manages various railroad track and facility construction projects ranging from minor improvements to major facility construction projects.

In 17 years of volunteer work for the Association, Joel has held numerous positions including Superintendent for Track Maintenance, Director, and Vice Chairman. In addition to his current role as Project Manager, Joel leads a volunteer work crew that constructs and maintains the Association's railroad track. For the Car House project, Joel will be responsible to organize and lead the volunteer crews that will construct the track required for the facility.



# **Bay Area Electric Railroad Association**

## **Question 6: Project Team and Supporting Documents**

### **Collections Manager David Johnston**

#### **Principal Mechanical Engineer, BART (Bay Area Rapid Transit)**

David Johnston is a Mechanical Engineer with over 40 years experience in (modern and historic) rail car repairs, construction, and preservation.

At the Western Railway Museum, David Johnston is the Superintendent of Equipment, Chairman of the Collection Committee (Collections Manager), a member of the Board of Directors, and a major donor. His responsibilities are associated with the preserved railcars and their equipment. He is responsible for maintenance, conservation and restoration of these rail cars. As Chairman of the Collection Committee, he provides leadership in determining what new acquisitions should be made, what equipment to remove for the collection, and to set priorities for maintenance and restoration of the Museum's collection. He has been active with the development and operation of the Museum for 40 years.

As Principal Mechanical Engineer, Mr. Johnston currently oversees rail car design and repair for BART (Bay Area Rapid Transit), and has held the same position at both the Union Pacific Railroad and the Western Pacific Railroad. His vocation has been in the rail and transit industry in locomotive and car construction and rebuilding since 1978.

He worked full-time at the Seashore Trolley Museum in their Conservation Department in 1974, and continues to do historic railway preservation consulting work for three other trolley museums around North America, advising them on details of equipment conservation and preservation. He has degrees in Mechanical Engineering and Business Administration.

Dave is also an experienced designer of, and consultant for, HVAC humidity and climate control systems. Temperature, humidity, and ultra-violet light control are major features of this project to protect the collection from deterioration. His investigation into appropriate design features for facilities housing large artifacts lead to many of the design features incorporated in the Loring Jensen Memorial Car House.

# **Bay Area Electric Railroad Association**

## **Question 6: Project Team and Supporting Documents**

### **Archivist and Exhibit Designer Bart Nadeau**

Bart Nadeau is the Chair of the Association's Archives Department. In addition to responsibility for the Archives and the F. M. Smith Memorial Library, Bart also manages the design and installation of exhibits at the Museum. For the Car House Three Project, Mr. Nadeau will lead the design effort for the small artifact displays and will create interpretive materials.

He has been associated with the Bay Area Electric Railroad Association since 1957 when he went on an excursion over the remaining Key System East Bay lines in the Association's car #271. With the acquisition of the present Museum site in 1960, he helped load and move the cars from Bay Area storage sites to the Museum. Track construction and tree planting are other areas that Bart worked on in the early days of the Museum.

After service in the US Navy aboard an aircraft carrier during the Viet Nam conflict, he pursued a career in the Traffic Department of the Southern Pacific Company in a variety of assignments in Sales and Marketing Management. His last five years was in the Corporate Communications Department as Director of Advertising. In this assignment he was responsible for development and management of trade press print advertising and trade show exhibits.

Mr. Nadeau's interest in the Association was rekindled by the "20 Grand" campaign to rehabilitate a portion of the Museum's interurban collection. An opportunity for early retirement saw him begin to volunteer in the Archives and in 1992 he was appointed Chair of that Committee (now Department).

Since then, he has continued to serve in the Archives Department and also served several years as Chair of the Marketing Committee. He has served four terms on the Board of Directors and served as Corporate Secretary for several years. He served on the fundraising committee for the Visitors and Archives Center and designed and laid out the Archives and Library sections of the Center. Specifically, he planned and supervised the creation of the temperature and humidity controlled Archives Wing of the Visitors Center, as well as the F. M. Smith Memorial Library.

By supervising twenty dedicated volunteers, BAERA's 58-year accumulation of historic documents, plans, drawings, photographs, and books have finally been brought under one roof for sorting, organizing, conservation, and filing. He designed and implemented a relational database, and to date, more than 15,000 items have been cataloged.

Mr. Nadeau has degrees in both US History and Business Administration from San Francisco State University. He is a Sustaining Member of the Association. He is a long time member of the California Library Association and the Society of California Archivists. In addition, he is a member of the California Historical Society and the San Francisco Museum and Historical Society as well as many other railway history and preservation organizations.

## **Bay Area Electric Railroad Association**

### **Question 6: Project Team and Supporting Documents**

#### **Overhead Lines Superintendent Chris Pagni**

Chris Pagni is designing the overhead electric lines that will be installed as part of the Loring C. Jensen Memorial Car House, making sure they comply with the regulations of the Public Utilities Commission.

Four years after Chris Pagni's birth at Stanford Hospital in San Francisco, he and his parents relocated to Portland, Oregon. Chris attended public schools and graduated from Polytechnic School. By then Chris had already developed a keen interest in the design and construction of overhead current distribution systems for street railways and trolley coaches. He enrolled at Oregon State University where he majored in electrical engineering.

Mr. Pagni summarily found employment with International Business Machines (IBM) as a technical staff representative. In 1964 he vacationed in the San Francisco Bay Area and a year later secured an IBM transfer to San Francisco. Chris became a member of the Bay Area Electric Railroad Association (BAERA) in 1965 and assisted with the installation and maintenance of the overhead lines that permit operation of the streetcars and interurbans at the organization's Western Railway Museum in Solano County.

In the ensuing years as Chris continued his professional activities with IBM, he began a long series of self-study tours of overhead line applications in the United States, Canada, Central and South America, Asia and Europe.

His BAERA peers recognized Chris's leadership qualities and he was elected many times to the Association's Board of Directors. He has served as Chairman of the Board, Corporate Secretary, and Chair of the fundraising team for the \$1.5 million, 12,000 square foot Visitor and Archive Center.

A year after BAERA had successfully mounted a \$250,000 fundraising campaign to purchase 22-miles of the former Sacramento Northern Railway right-of-way from the Union Pacific Railroad, Chris designed a detailed replication of the overhead line system that once existed on the railway. In 1994 the first one-quarter mile section was re-electrified. That landmark achievement was followed by a series of similar endeavors and today Museum visitors are afforded a ride that extends 5 miles. In the coming years additional track will be similarly electrified using Mr. Pagni's designs.

After 30-years of service with IBM, concluding as an Artificial Intelligence programmer at the company's Palo Alto campus, Chris took early retirement. However, his retirement was short-lived when an acquaintance enticed Chris to take what was described as a part-time position as a representative for IMPulse NC, a leading US manufacturer of overhead line parts and traction power substations. With his partner now retired, this evolved into a full-time position with rapid transit, light rail and utility clients in San Diego, Los Angeles, San Pedro, San Francisco, Oakland, Sacramento, San Jose, Portland, Tacoma, Seattle, Vancouver, Edmonton and Calgary.

# **Bay Area Electric Railroad Association**

## **Question 6: Project Team and Supporting Documents**

### **Capital Campaign Committee Member John M. Vasquez** **Solano County Supervisor District 4**

Supervisor John M. Vasquez was elected to serve as Supervisor for the 4th District in November 2002. John took his oath of office on January 7, 2003. The district he represents covers west Vacaville up to the Yolo County line, the northern portion of Travis AFB and northern Fairfield east of Hwy 80 and north of Airbase Parkway.

John graduated from Vacaville High School. As a youth he worked in the farming industry and the family business. Currently he is a co-owner of the family business, Vasquez-Deli. He gained much of his practical knowledge through real-life experiences, learning from his peers as a retail clerk, as a laborer on the Alaska Pipeline and fellow community leaders. In addition, John served with the California and Alaska National Guard.

John has spent his lifetime as a community servant, both publicly and privately, serving as the youngest Vacaville City Councilman for four years and as Administrative Assistant to former Supervisor Bill Carroll. His community involvement includes Trustee of the Vacaville/Elmira Cemetery District for 17 years, a member of both Vacaville and Fairfield/Suisun Chambers of Commerce and a volunteer for several community action committees including The United Way, Farm Bureau, Native Sons of the Golden West, Vacaville Fiesta Days Participant (El Rancho Vasquez – 39 years straight), member of the Friends of the Solano County/Dixon May Fair, former trustee of the Vacaville Museum, and member of the Loring C. Jensen Memorial Car House Capital Campaign Committee.

John is married to the former Shelli Huffman and is the father of three daughters and one son. He is the son of Nicha and John Vasquez of Vacaville and the oldest of the four Vasquez sons.

Of major importance to John is the preservation of agriculture, public safety, transportation, veterans and economic development throughout Solano County. In addition, happy, healthy and safe children in Solano County are a necessity.

As a Capital Campaign Committee Member, he shares responsibility for raising the \$2,122,868 needed to complete the Loring C. Jensen Memorial Car House Project. To date, over half of the necessary funds needed have been secured.

# **Bay Area Electric Railroad Association**

## **Question 6: Project Team and Supporting Documents**

### **Capital Campaign Committee Member Ruth Forney** **Solano County Supervisor District 5**

Ruth Forney was recently appointed to fill the District 5 seat on the Solano County Board of Supervisors. Ruth's district includes eastern Solano County, including Dixon, Rio Vista, the unincorporated area of Elmira and eastern portion of Vacaville and Suisun.

Ruth moved to Solano County in the early 1960's when her father was transferred to Travis Air Force Base. She graduated from Armijo High School in 1968 and married her high school sweetheart, who went on to serve in the US Army and is a Vietnam Vet. Ruth has two sons currently serving in the US Army.

Ruth has a long history serving Solano County; she worked for the county's Health and Social Services Public Health Lab for over 25 years. Ruth is the former President of Service Employees International Union (SEIU), Local 1280, the county's largest bargaining unit. Ruth was elected President in 1994, and was re-elected President four times. Ruth served on SEIU's board of Auditors, and is the former chair of the SEIU Western Region African American Caucus and former member of the Napa/Solano Central Labor Council. Ruth is also a member of the NAACP Tri-City branch and served on the In-Home Supportive Services Public Authority, a position she was appointed to by the Solano County Board of supervisors in 2000, but vacated when she took her board seat.

Ruth presently serves as Solano County representative on:

- Association of Bay Area Governments (ABAG) Hazardous Waste Management Facility Allocation Committee Board
- Delta Protection Commission
- Yolo-Solano Air Quality Management District Board of Directors
- Partnership Healthplan of California Board of Directors
- Solano County Water Agency Board of Directors
- Winters Branch Library Financing Authority
- Transportation Land use Sub-committee.

Ruth is also member of the Fairfield/Suisun, Vacaville, Rio Vista and Dixon Chambers of Commerce, and a member of the Travis Regional Armed Forces (TRAF) committee. She has served on numerous fundraising campaigns for local charities.

District 5 is the largest geographic district in the county, includes the largest portion of agricultural land, and has many diverse constituent issues. Ruth understands fully the inner workings of county government, is experienced and enjoys broad support from a network of diverse agencies, department heads, county staff and others. With the mission of the board guiding her, and her interests in land use, veterans, seniors and childcare issues, and agricultural issues, Ruth is available for any constituent that needs her help. She believes working hard for the entire community will ensure a bright and promising future for all county residents.

As a Capital Campaign Committee Member, she shares responsibility for raising the \$2,122,868 needed to complete the Loring C. Jensen Memorial Car House Project. To date, over half of the necessary funds needed have been secured.

## **Bay Area Electric Railroad Association**

### **Question 6: Project Team and Supporting Documents**

#### **Capital Campaign Committee Member Cameron Beach** **Chief Operating Officer, Sacramento Regional Transit**

Cameron Beach has been a member of the Bay Area Electric Railroad Association since 1963. He began volunteering at the Association's Western Railway Museum in the mid-1960's. Most recently, he was part of the selection committee to hire the organization's first Executive Director and is currently a member of the Capital Fundraising Committee for the Loring C. Jensen Memorial Car House Project.

The knowledge gained as a member of the Association is the single biggest factor in his success as a senior transportation executive. Since 1991, Mr. Beach has been the Chief Operating Officer of the Sacramento Regional Transit District. As the second highest-ranking transit official in Sacramento, he is responsible for all bus and rail operations, maintenance, and security, including preparation of the plan for opening 10 miles of rail extensions in the next year. He oversees over 900 employees and contractors involved in day-to-day operation, and an annual budget of \$83 million.

Prior to his promotion to Chief Operating Officer, he was Sacramento Regional Transit District's Light Rail Manager from 1983-1991, leading the effort to put Sacramento's Light Rail System in operation. The system opened in 1987 and has consistently exceeded all ridership expectations. Its success has spawned two extensions, both currently under construction.

From 1967-1983, he worked in a variety of positions in public and private sector transportation, including a Class 1 railroad, an airline, as well as charter, line-haul and urban bus transportation. Mr. Beach attended Golden Gate University in San Francisco. Other appointments include:

- Chair, Outreach Subcommittee, American Public Transportation Association
- Vice Chairman, Bay Area Electric Railroad Association (BAERA)
- Board Member, San Joaquin Valley Rail Committee
- Board Member, Market Street Railway

Mr. Beach brings his vast experience in transportation planning, public policy, finance, project oversight, and revenue generation to the Car House Three Project.

**Bay Area Electric Railroad Association**  
**Question 6: Project Team and Supporting Documents**

**Capital Campaign Committee Member Howard Abelson**

Howard P. Abelson has been a member of the Bay Area Electric Railroad Association since 1963. He currently serves the Association as pro-bono legal counsel and member of the Capital Campaign Committee. Previously, he served as a member of the Board of Directors and as chairperson of the Board.

Born in Los Angeles, California, he has a bachelor degree from the University of California at Berkeley and a Juris Doctor degree from UC's Hastings College of Law in San Francisco. He is a member of the California State Bar and currently is engaged in the private practice of law in Richmond, California. His current practice is mainly in the area of probate, wills and trusts. Prior to entering private practice he was employed as a Deputy City Attorney with the City of Oakland and as a Deputy District Attorney for San Bernardino County.

Howard served two terms on the El Cerrito City Council, including terms as Mayor and Vice Mayor. He also served on the Board of Directors of the San Francisco Bay Area Rapid Transit District (BART). He currently serves on the San Joaquin Valley Rail Committee as a representative of the Contra Costa County Board of Supervisors and serves as the chair of the Committee's finance and legislative affairs subcommittee. He chairs Contra Costa County's Ad- Hoc Intercity Passenger Rail Committee.

Howard has been an active school volunteer, currently serving as president of the El Cerrito High School Student Activity Fund Inc. He is a past president of the Albany -El Cerrito Exchange Club. He has served on numerous other city, county and school district committees.

As a Capital Campaign Committee Member, he shares responsibility for raising the \$2,122,868 needed to complete the Loring C. Jensen Memorial Car House Project. To date, over half of the necessary funds needed have been secured.



**Bay Area Electric Railroad Association**  
**Question 6: Project Team and Supporting Documents**

**Capital Campaign Committee Member John Holt**  
**General Manager, Western Railway Museum**

John Holt is the Museum's General Manager. In addition he is a Director of the Association and sits on the Capital Campaign Committee. He has been associated with the Museum for more than 30 years.

Mr. Holt is a graduate of California Polytechnic State University – San Luis Obispo with a degree in Electrical Engineering, and is a licensed engineer in the State of California. He brings to the Museum a wealth of management experience gained from his 35 years of electric operations management with Pacific Gas and Electric Company. Mr. Holt's accomplishments include management of major construction projects, development of advanced remote control systems that were adopted as PG&E's system-wide standard, and direction of electric service restoration to San Francisco after the Loma Prieta earthquake.

In his volunteer position as General Manager, Mr. Holt manages the Museum's operating departments, including: train operations; historic equipment maintenance, conservation and restoration; track maintenance and construction; electric line maintenance and construction; and buildings and grounds maintenance. He develops annual budget and business plans for the Museum and contributes to Museum long range planning. With the completion of the new Car House 3 (Display Building), he will be responsible for the integration of the new facility into the visitor tour of the Museum. Mr. Holt also works closely with the Museum's Land Manager in dealing with requests for crossing or for other compatible uses of the Museum 22-mile railway, bringing in additional revenues for Museum operations.

Mr. Holt contributes 30 hours, or more, per week to his Museum activities. As a Capital Campaign Committee Member, he shares responsibility for raising the \$2,122,868 needed to complete the Loring C. Jensen Memorial Car House Project. To date, over half of the necessary funds needed have been secured.

# **Bay Area Electric Railroad Association**

## **Question 6: Project Team and Supporting Documents**

### **Capital Campaign Committee Member William Kluver**

#### **Chairman of the Board of Directors, Bay Area Electric Railroad Association**

A fourth-generation San Franciscan, Bill Kluver was born in 1940 and grew up in the Parkside neighborhood. Living close to Sloat Boulevard, Bill became fascinated with Market Street Railway's No. 12-line that ran down to the zoo. That exposure led to his joining the Bay Area Electric Railroad Association in 1957. At the time he was attending Lincoln High School, followed by two years at San Francisco City College where he earned an Associate of Arts degree in photography.

Bill soon found employment at Macy's where he sold cameras, a position he held for many years. He also served as official photographer on Western Pacific Railroad's "Caribou Country Specials". Bill held a like position with Great Western Tours, a travel agency that operated special trains to Mexico and Canada. Good fortune smiled on Bill after he inherited sizeable acreage near Auburn, California. The property was purchased from him by the federal government for a dam and reservoir site that was never built.

Bill's dual interest in railroads and travel prompted him to join Amtrak where he worked as a dining car waiter on the long distance route between Oakland and Chicago. He has many humorous tales to tell of that experience. Then and quite unexpectedly, Bill was asked by the Southern Pacific Railroad (SP) to hire on as a business car attendant. At the time, SP maintained a fleet of business cars that were offices on wheels that featured an open observation platform, a rear lounge, sleeping quarters, a dining room, kitchen and pantry, and crew quarters.

Within a year of hiring, Bill had been promoted several times and became the attendant on the car "Sunset" occupied exclusively by Mr. Benjamin F. Biaggini, SP's Chairman of the Board. When Mr. Biaggini retired, so did Bill.

In the mid-1960's Bill purchased the heavyweight Pullman 8-Section-Restaurant car "Circumnavigators Club" that was used for both BAERA excursions as well as for personal travel. However, with the coming of Amtrak, Bill decided to retire the car from active service and donated it to BAERA. Today the car is used for entertaining important guests and for fund raising purposes. It is here where Bill displays his talents as a chef. Authentic Pullman china, silver and linens make dining on board the "Circumnavigators Club" a unique experience.

Today, Bill serves as the BAERA's Chairman of the Board. He has served as President or Director for over 30 years. Bill manages Phil Kohlmetz, BAERA's full-time Executive Director, and oversees his appointed volunteers who handle a range of departments including the Museum Store, Depot Café, Archives, and Publications. Bill enjoys being involved with Museum enhancement and development projects.

As a Capital Campaign Committee Member, he shares responsibility for raising the \$2,122,868 needed to complete the Loring C. Jensen Memorial Car House Project. To date, over half of the necessary funds needed have been secured.

# **Bay Area Electric Railroad Association**

## **Question 6: Project Team and Supporting Documents**

### **Capital Campaign Committee Member Walter Rice, Ph.D.**

Dr. Rice's tenure on the board of directors of the Bay Area Electric Railroad (BAERA) Museum began this past March. Besides the normal duties of a board member, he is a member of the Car House Three, AKA the Loring C. Jensen Memorial Car House, Capital Campaign Committee and chair of the newly created Web Committee. The goal of the Web Committee is to reinvigorate the Western Railway Museum's web site.

Both his professional background and prior nonprofit service qualify him for these positions. He is a Professor of Economics *Emeritus*, California Polytechnic State University, San Luis Obispo. During the last decade of his tenure at Cal Poly, he served as Associate Dean of the Orfalea College of Business, Director of Graduate Management Programs and Area Head, Economics and Global Strategy & Law. In these capacities, he worked not only with students and faculty, but dealt with strategic planning and advancement (fundraising).

Dr. Rice has also coauthored a variety of transportation studies that have resulted in the implementation of rail and bus services. Further, he has authored and co authored over 50 published articles dealing with transportation history, analysis and policy, plus four books. (A detailed listing is available upon request.) The writings and research associated with these efforts have further enhanced for him the importance of facilities such as the Car House Three Project as an important linkage between the past and the future by helping to ensure the preservation of important irreplaceable artifacts.

Previously, he served for nine years on the nonprofit Friends of the Cable Car Museum board. In that capacity, he developed and wrote the content for their web page, dealt with the city government of San Francisco with respect to a variety of contractual issues and civic projects and negotiated successful the procurement of important historic artifacts.

# **Bay Area Electric Railroad Association**

## **Question 6: Project Team and Supporting Documents**

### **Capital Campaign Committee Member Bruce Singer**

Present Occupation: Retired

Former Occupation: Partner, McCutchen, Doyle, Brown and Enersen (Now Bingham and McCutchen, San Francisco and Walnut Creek, California)

Mr. Singer's law practice was devoted to real estate matters with emphasis on development and transactions. He counseled clients on the full range of legal issues affecting the development process, from acquisition of the land and processing of the governmental permits and approvals through construction of the improvements and marketing of the completed project. Both within and outside of the context of new development, he advised clients with respect to the acquisition, disposition, leasing and financing of all kinds of income producing residential, commercial and industrial property.

#### **Education:**

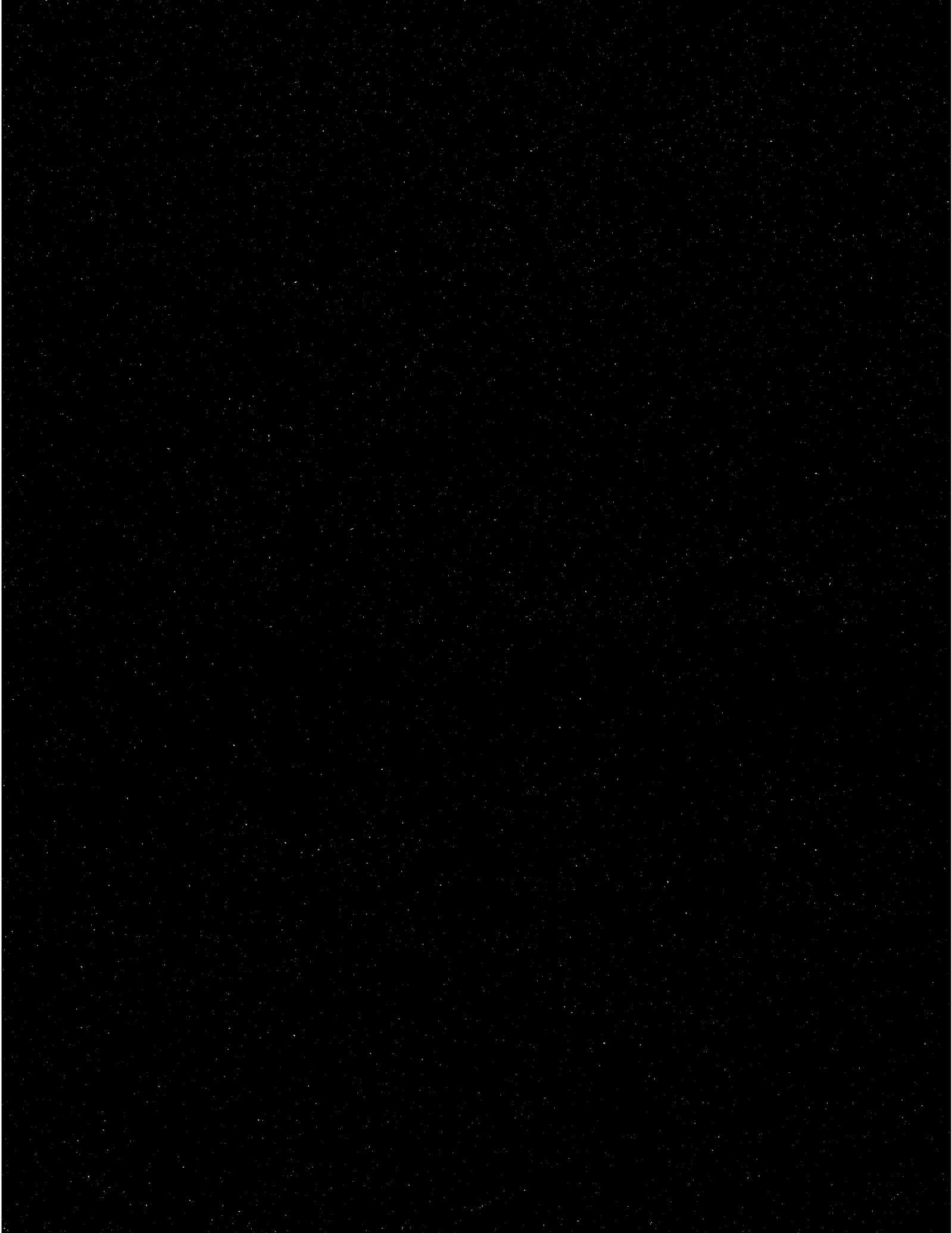
- B.A. with Highest Honors (Geography), UCLA. Elected to Phi Beta Kappa and Pi Gamma Mu.
- M.B.A. (Real Estate), UCLA. Elected to Beta Gamma Sigma.
- J.D., UC Berkeley (Boalt Hall). Elected to Order of the Coif.

#### **Connections with the Bay Area Electric Railroad Association in General and the Car House Three Project in Particular:**

- Member of the Board of Directors and Operating Committee.
- Member of the Capital Committee, Car House Three Project.
- Land Manager: Responsible for establishing agreements with third parties seeking to use or cross the lands owned by the organization.

Length of Active Affiliation with BAERA: 10 years

Length and Nature of Involvement with Car House Three Project: Since inception, Mr. Singer has provided oversight with respect to the legal aspects of the project development.





**PAGE ONE OF TWO**

**California Cultural and Historical Endowment  
Grant Application Face Sheet**

Applicant Name:  
(Organization or Public Agency) Golden State Museum Public Benefit Corp.

Applicant Address: 1020 "O" Street  
Sacramento, CA 95814

Public Contact Regarding this Project: Ross McGuire, Director  
Public Contact Telephone: (916) 653-1771  
Facsimile: (916) 653-0314  
Email: rmcguire@ss.ca.gov

Non-profit Organization Federal  
Employer Identification Number: EIN # 94-3015670

Name of Project: California Women's History Museum,  
Planning and Design

Project Amount:  
(Total Amount of Project) \$15.195 million

Amount you are Requesting from  
CCHE: \$375,000

Project Location: California State History Museum  
(indicate exact address,  
City and County) 1020 "O" Street  
Sacramento, CA 959814  
Sacramento County

Anticipated Project Start Date: January 2005

Anticipated Completion Date: Planning and design phase: December 2005

Location Latitude and Longitude: 38°34'29" N, 121°29'44" W

Website Address (if applicable) [www.ss.ca.gov/museum/intro.htm](http://www.ss.ca.gov/museum/intro.htm)

**PART ONE - CCHE FACE SHEET**

**PAGE TWO OF TWO**

**BRIEF PROJECT DESCRIPTION:**

This project is to plan, develop and construct the California Women's History Museum at the California State History Museum in Sacramento.

The project scope includes planning, research, design, development and construction of approximately 17,000 square feet of permanent interpretive museum exhibits. These exhibits will focus on the historic and contemporary contributions of women in California and the history of California as seen through their eyes.

The projected total project value is \$15.195 million.

This application is for the amount of \$375,000 to support project planning and to prepare preliminary working drawings.

The applicant anticipates submitting a follow-on request to the California Cultural and Historical Endowment during a future grant cycle for a portion of the funds required to construct the project.

The funds requested under this application will be used for planning and design work necessary for the future construction of capital assets. As such, they are incidentally but directly related to construction, and are eligible for funding from the California Clean Water, Clean Air, Safe Neighborhood Parks and Coastal Protection Act of 2002.

CCHE Use Only:

Department Reference No.: \_\_\_\_\_

Bond: \_\_\_\_\_

Budget Year: \_\_\_\_\_

Award Date: \_\_\_\_\_

Type of Award: \_\_\_\_\_

Project Type: \_\_\_\_\_



## PART ONE - CHECKLIST AND ACKNOWLEDGEMENT FORM

### Page One of Two

### Checklist and Acknowledgment Form

**NOTE: A SIGNED COPY OF THIS FORM MUST BE INCLUDED WITH YOUR CCHE GRANT APPLICATION. AFTER YOU HAVE DETERMINED THAT YOU HAVE INCLUDED ALL OF THE INFORMATION LISTED ON THIS CHECKLIST, PLEASE DOUBLE CHECK THE INFORMATION BY INITIALING AFTER EACH ITEM REQUESTED, SIGN AND DATE IT.**

Item

Initial

#### PART ONE OF CCHE GRANT APPLICATION CONSISTING OF:

1. CCHE Face Sheet (2 pages)
2. Checklist and Acknowledgment Form (2 pages)

*RM*  
*RM*

#### PART TWO OF CCHE GRANT APPLICATION CONSISTING OF:

Answers to Questions One-Six  
(each question must follow page/space allocation)

- Question 1: Project Description and Project Goals
- Question 2: Project Audience and Needs Assessment
- Question 3: CCHE Priorities
- Question 4: Project Maintenance and Public Accessibility
- Question 5: Tasks, Budget and Matching Requirement
- Question 6: Project Team and Supporting Documents

*RM*  
*RM*  
*RM*  
*RM*  
*RM*  
*RM*

#### PART THREE OF CCHE GRANT APPLICATION CONSISTING OF:

##### Attachments to the CCHE Grant Application

- Attachment 1: Visual Description of Proposed Project
- Attachment 2: IRS Determination Letter\*
- Attachment 3: Non-Profit Organization by-laws\*
- Attachment 4: Non-Profit Organization Articles of Incorporation\*
- Attachment 5: IRS Form 990 or 990EZ or 1023\*
- Attachment 6: Non-Profit Organization's Board of Directors, staff and volunteers\*
- Attachment 7: Copy of Resolution

(\*non-profit organizations only)

*RM*  
*RM*  
*RM*  
*RM*  
*RM*  
*RM*  
*RM*

**PART ONE - CHECKLIST AND ACKNOWLEDGEMENT FORM**

**Page Two of Two**

**Acknowledgement**

The CCHE grant applicant signing below declares the following:

The applicant understands that by submitting this CCHE Grant Application, that he/she is indicating that the information submitted therein is true and accurate to the best of their ability and that the applicant waives any and all rights to privacy and confidentiality of the material submitted.

The applicant also understands that if any part of the information in the CCHE Grant Application is found incorrect, inaccurate or if there is a change in the information provided in the CCHE Grant Application after it is submitted, that this information will be made known to CCHE in writing as soon as possible.

Signed:

Ross McGuire

Date:

October 1, 2004

Print Name: Ross McGuire

Title: Museum Director

## QUESTION ONE -- PROJECT DESCRIPTION AND PROJECT GOALS

This project is to plan, design and develop a formal world-class museum about the women who helped build and continue to shape the State of California in every field of endeavor. To be located in Sacramento, the total project budget is \$15.195 million: this request for CCHE funds is for \$375,000 to support planning and initial design work.

The overall project goal, indeed the mission, is to create a permanent institutional setting for study, research and public interpretation of the role of women in the state's history and the history of California as seen through the eyes of women: to ensure that our history tells the whole story. The museum will provide services to approximately 200,000 visitors a year on-site, plus furnish significant outreach and external educational opportunities.

The specific goal for the phase of the project for which CCHE funds are being sought under this application is to conduct planning and research, design, and prepare preliminary working drawings adequate to define the final scope, content, and budget for final construction.

California has been shaped by remarkable women. Some have names that are celebrated in history, while countless others live--and succeed--in anonymity. All have had to find a balance between the powerful forces of work, career, education, and family. Many have struggled to overcome the effects of poverty, discrimination, and social pressure. Every one is a precious part of the fabric that is the great state of California. This museum seeks to tell their stories, to weave together the history of men and women in our state.

As significant as women have been in defining modern California, there is no site, museum or permanent exhibit that commemorates their role in a substantial way. Our existing historic sites and museums pay scant attention to women, and there have been few attempts to interpret individual women and their accomplishments. In many respects, the state history that is presented to the public is the history of men. In a sense, women are an underrepresented majority in California history.

Sacramento, as the State's center of political activity, is filled with monuments to prominent men—from Sutter's Fort and the governors' portraits in the Capitol to statues in public parks. Save for depictions of Minerva on the state seal, images of women are almost wholly lacking in our historic memorials.

First Lady Maria Shriver was struck by this disparity. Women represent more than half of the state's population, and have a record of achievement in every area of human activity. They are mothers, daughters, sisters and partners, community leaders and activists, inventors and entertainers, scientists, planners, artists, laborers, doctors, lawyers, caregivers, educators, businesswomen, soldiers, politicians, farmers, and a thousand other things. Not only *can* women do anything, they *do* anything, and everything. As Ms. Shriver has said, "women serve 24/7 on the front lines of humanity," and are at the core of our culture, our society, and our history. As a way to address the lack of representation, in early 2004 Ms. Shriver, working with the California State History Museum, the California Secretary of State, and California State Parks, presented an exhibit titled *California's Remarkable Women* at the California State History Museum. A diverse group of advisors, consultants and scholars worked to develop the exhibit's content and direction. The concept of this exhibition was to show how women from every walk of life strengthen, shape and serve our great state. *California's Remarkable Women*

honors their roles and achievements, drawing its inspiration from historic and contemporary California women. By showcasing remarkable women of the past and present, the exhibit delivers a positive message about the limitless opportunities and possibilities awaiting present and future generations. By celebrating human achievement, the exhibit engages and inspires girls and boys, women and men.

The exhibition *California's Remarkable Women* opened in mid-May 2004 to significant popular and critical acclaim. It has raised the question: why not fill in these missing pieces of California's history comprehensively and permanently? While intended to be a one-year exhibition, *Remarkable Women* has also served as an experimental tool to explore and test concepts for a permanent installation that will preserve, portray and honor the role of women in California history.

The firm Museum Management Consultants Inc. conducted an evaluation of concepts and exhibit themes for a possible California Women's History Museum. Focus group assessments were conducted in Los Angeles, San Francisco and Sacramento to study the interest and appeal of the overall concept and evaluate specific interpretive approaches that might be implemented in such a museum. The findings were supportive of the idea that a formal museum devoted to the history of women would be popular and successful, and would meet a need that was not being addressed in any other way. (The full report and analysis is available for review by CCHE.)

These positive conclusions prompted discussion among the key participants in the *California's Remarkable Women* project about the possibility of creating a permanent California Women's History Museum. Inspired by the need and encouraged by the reception to the *California's Remarkable Women* exhibit, serious discussions about next steps have been proceeding for months. During this process, it was determined that the California State History Museum at the State Archives in Sacramento would be suitable as the site for the museum. The trustees of the Golden State Museum Public Benefit Corporation formally endorsed the proposal to renovate the galleries of the California State History Museum and transform it into the California Women's History Museum. The Secretary of State has agreed to make the facilities that presently house the California State History Museum available for the women's museum project. The many advisors, consultants, scholars and leaders who supported the *Remarkable Women* exhibit have pledged their support for a permanent California Women's History Museum. The Secretary of State and the Museum Board have stated strong support for maintaining the display of Archives material, including California's constitutions, in additional and expanded exhibit installations within the Archives complex.

The exhibition planning and design firm ESI Design was invited to submit a proposal to carry out the project, and a workplan and budget to plan, develop and construct the California Women's History Museum at the California State History Museum in Sacramento has been prepared. The project scope includes planning, research, design, development and construction of approximately 17,000 square feet of permanent interpretive museum exhibits. The total project value is \$15.195 million. This application is for the amount of \$375,000 to support full project planning and to prepare construction documents. The applicant anticipates submitting a follow-on request to the California Cultural and Historical Endowment during a future grant cycle for a portion of the funds required to construct the project.

## QUESTION TWO -- PROJECT AUDIENCE AND NEEDS ASSESSMENT

### PROJECT NEED

The key deficiency to be addressed by this project is the lack of any formal, organized interpretive facility devoted to telling the story of women in California history.

This is a topic that clearly deserves presentation in a substantial, complete manner, using modern interpretive techniques and methods, based on current approaches to research, and oriented toward the interests of a broad public audience. Put simply, this subject warrants development of a high-quality museum.

There is nothing like this in California. An initial evaluation of existing sites, exhibits and resources was conducted as a part of the research for the *California's Remarkable Women* exhibit. The survey found that current known efforts to present the heritage of California women are small in scope and modest in scale. There are significant and larger scale projects with a different focus such as the International Museum of Women to be located in San Francisco and the National Women's History Museum proposed for Washington D.C., but there is no museum in California dedicated to the women of California.

Across the state there are other activities underway to promote study and research in women's issues and women's history, and there are locally based facilities that present some aspects of the larger story. A few State Historic Parks and museums have exhibits that pertain to specific individuals--such as architect Julia Morgan at Hearst San Simeon State Historic Monument, for example--but the extent and depth of these exhibits is limited. In most cases, museum exhibits focus on the role of male personalities and the activities of women are presented as something of secondary or background interest.

Presentations in museums pertaining to the state's historic communities—from the pre-European contact cultures through the Gold Rush to the contemporary era—tend to deal with women inferentially, as just a portion of the overall population under consideration. Specific characteristics of women's experiences are customarily dealt with only within the context of "women's work;" food gathering and preparation, child rearing, and traditional handicrafts. This approach minimizes the contributions of women in history and perpetuates the perception that the work women perform is ancillary, incidental or secondary in cultural importance to the work of men.

The objective of the women's museum project is to present women and their contributions in a current interpretation of California history. The goal is not to revise history but to complete history. The museum will approach the subject in an integrative, equitable and holistic manner.

The concerns of women in history, and the understanding of the state's history from the perspective of the women who lived through that history, encompass and transcend the related issues of race, ethnicity, class, education, occupation, geography, marital status, language, social equality, law, and a host of other factors that define the lives of women from every background and in every era. The proponents of this project recognize that women in each cultural group have faced, and address today, distinctive issues unique to their situation. The California Women's History Museum will recognize that there is not a single or uniform

"women's experience," and will address the similarities and the differences shared by women in what is now California over the past 12,000 years.

Modern American values have evolved to recognize that women possess not only legal and political equality, but also social and cultural equality. This is a cornerstone of our conception of a democratic society. It is important that all of our educational institutions, including museums, actively embody these values. Creation of the California Women's History Museum will help accomplish this. It is a forward-thinking and ambitious enterprise that warrants CCHE support.

## **AUDIENCE**

The California Women's History Museum will attract an audience that has not been traditionally engaged in California history. The indicator of success is evident in the 100% growth in general attendance (non-student) at the California State History Museum since the installation of the *California's Remarkable Women* exhibit.

The museum will emphasize outreach to California women and girls with exhibits and programs that enlist their engagement and encourage their participation. Women are a key audience, and will participate and contribute to the growth of the program. But this museum will not fulfill its potential if it only speaks about women's history to women. The museum must bring an understanding of women's heritage to the broadest and most diverse audience possible, male as well as female, and its exhibits and programs will be designed to appeal to every segment of the visitor population.

A central tenet of this initiative is that the audience for this museum will not be limited to women. They will bring their children, spouses, friends and relatives. Teachers will bring their classes. The museum will engage visitors regardless of their age, gender, race or background, and invite them to see our shared history from a new perspective. The unique and distinctive focus of the museum and a compelling experience using innovative, interactive designs will generate a broad statewide audience for visitation and membership. The participation of accomplished, well-known women across the state including First Lady Maria Shriver will create statewide interest and visibility in the institution and its program offerings.

Attendance is forecast at approximately 200,000 visitors per year for on-site programs. This is a dramatic increase over current attendance, and assumes maintenance of the California State History Museum's existing core constituency of students and teachers (60% of current attendance), and of the recruitment of new audience segments of adults and families, women's and girls' organizations, and visitors in organized tour groups.

The impact of the capital investment will be multiplied by the creation of a facility that will serve as an originator of programming and activities that will promote the consideration of women's history throughout California. It is projected that each year more than 300,000 Californians from throughout the state will enjoy programs in their communities that are created or facilitated by the new California Women's History Museum.

### **QUESTION THREE -- CCHE PRIORITIES**

This project directly addresses numerous CCHE priorities, and is highly responsive to the goals of the Endowment.

The California Women's History Museum will preserve, interpret, and enhance understanding and appreciation of a fundamental aspect of the state's culture: women. The CCHE priorities speak to factors pertaining to "significant elements that add to the State's cultural, social, and economic evolution." The place and contribution of women in the state's evolution is integral to understanding and interpreting nearly everything else.

Women are instrumental in every aspect of the state's history, including:

- \*significant events occurring in the 20th century
- \*unique identifiable ethnic and other communities
- \*culturally significant changes
- \*illustrations of California's economic strength
- \*factors contributing to the national defense activities
- \*California's living cultural heritage and folk life
- \*Native American archeology, history and culture
- \*California history, archeology and culture

It is not an exaggeration to suggest that everything related to history that is within the CCHE's areas of emphasis is also related to women, and that this project pertains to literally everything the CCHE aspires to accomplish.

It has been clearly established that women represent one of the "underrepresented threads" of California's story that "are absent or underrepresented in existing historical parks, monuments, museums and other facilities." Women are integral to our culture—and are the transmitters of culture everywhere in the world—but are missing in the way the majority of cultural institutions speak about society in California.

There is no site, museum or substantial public exhibition in California of the scale and sophistication envisioned for the California Women's History Museum. This museum will reach 200,000 visitors directly each year—including at least 50,000 school children—plus another 100,000 through formal off-site programs and potentially millions more through electronically-delivered program offerings. This museum will become a center of research, education, discourse and active programming, the center for events and a focus for discussion of women's history, culture and issues.

The proposed location one block from Capital Park in Sacramento not only makes it convenient of access for policymakers, but also impossible to ignore from the perspective of the subject matter it will represent. By supporting this application, the CCHE will be supporting the needs, issues and perspectives of all women in California, and helping to create a forum for all Californians, men and women, to see and understand the state's history in a new way. This is a great opportunity that must be seized now for the project to move forward.



## **QUESTION FOUR -- ONGOING PROJECT MAINTENANCE AND PUBLIC ACCESSIBILITY**

### **PART ONE: PROJECT MAINTENANCE**

The California Women's History Museum is a project of the Golden State Museum Public Benefit Corporation (GSMPBC), supported by the Secretary of State, the First Lady, and an extensive network of collaborators. The GSMPBC has successfully staffed and operated the Golden State Museum, recently renamed the California State History Museum, since 1998. The California State History Museum is an ongoing enterprise whose purpose is the creation and the presentation of high quality public interpretive services about important aspects of the state's history. Both the museum and its operating entity have demonstrated past competence in financially maintaining and sustaining formal interpretive facilities, and providing high quality educational experiences to a diverse public audience. This performance will continue into the planning, development and operation of the California Women's History Museum.

Funds to support continuing operations and maintenance of the project will come from earned income (admission ticket sales, special-event facilities use revenues, and museum store receipts), memberships, and philanthropic contributions. The State of California will contribute through the funding of indirect operating (facility) expenses.

The Golden State Museum Public Benefit Corporation, with its small but capable professional staff, will be able to administer grant activities proposed in this application. It is anticipated that an enlarged staff with appropriate additional qualifications will be recruited to handle administration of the construction phase and subsequent operation of the Women's Museum.

The proposed location for this project is in the California State Archives Building, one block from the State Capitol in downtown Sacramento. This facility is owned by the State of California, and administered by the California Secretary of State. As a state building, important aspects of building maintenance and facilities support are already handled by the state and will not represent a cost or burden on the GSMPBC or the California Women's History Museum. As a result, the applicant's financial resources can be devoted directly to meet the core needs of the museum and its interpretive programs, and not be channeled toward meeting basic facilities maintenance and operation costs. This creates a very positive environment for the project's long-term sustainability: funds received by GSMPBC may be applied directly to program activities.

The plan for ongoing maintenance is linked to the strategy for accessibility and audience engagement. The GSMPBC will invest in and implement an annual campaign that reaches thousands of women throughout California and asks for an annual investment in the program of the California Women's History Museum. When 100,000 women each contribute \$10, the project will have a core of stakeholders with an investment in the initiative, and a million dollars in contributed revenue. Women represent a majority of the California population and an important multidimensional market. The applicant is confident that California and national businesses will see the museum as an attractive investment for philanthropic and market-driven contributions.

## **PART TWO: PUBLIC ACCESSIBILITY**

The product that will result from this project is a formal, public museum facility. The overall emphasis of all project activities will be to attract, inform, educate and entertain the largest and most diverse audience possible. The California Women's History Museum will be open to the public 2163 hours per year (seven hours per day, six days per week), and the facility will be available for special-event and after-hours uses up to six evenings per week.

Current attendance for the California State History Museum is 60,000 visitors per year. Two thirds of the attendance is generated by the education program oriented toward California school children in organized groups. The museum is integral to fourth grade school visits to Sacramento, and is a part of the Sacramento cultural attraction school-visit reservation program operated by California State Parks. In this regard, the California State History Museum is an integral element of the system of museums and educational destinations in Sacramento.

School tour groups are the primary users of all of Sacramento's museums five days of the week. Most of these museums are State Park units (California State Railroad Museum, State Capitol Museum, Sutter's Fort, Governor's Mansion, and--soon--the Leland Stanford Mansion). The California State History Museum shares an audience with these other facilities, and works with them closely to present compatible programming that meets the needs of teachers and their students. It is one block from Capital Park, and two blocks from the Leland Stanford Mansion, and is well-positioned to acquire and keep its educational audience. This audience and the external relationships will continue with the California Women's History Museum.

The museum has created a model program to support the study of California and US History. It has served students and teachers from virtually every county in the state, and the museum enjoys an impressive and growing rate of repeat visitation from teachers who depend on its unique services. These same capabilities to create a vital education program will be applied to the California Women's History Museum, and the applicant is confident that the current constituency of teacher clients can be transitioned to this new opportunity.

The current museum operation has exceeded all projections on the potential of the school audience and the same is expected with the women's history program. The planning target is to engage and serve 50,000 students a year: 25% of the goal for total attendance. The museum has developed relationships with teachers from throughout California and will prepare them for the creation of the new museum program. The California State Department of Education has acknowledged the opportunity created by the development of the California Women's History Museum, and the museum staff have begun work with the Department of Education to align and integrate the museum program with state curriculum objectives in order to insure its relevance to educators from every part of the state.

The education audience and market is a significant component of the plan for public access and engagement. The purpose of a capital investment in the California Women's History Museum is to create a facility that will provide focus on a significant but underrepresented theme of state history. A fundamental purpose of the museum, and the driving rationale for its efforts, will be the engagement of women and girls throughout the state in the creation of a dynamic and continually expanding women's history program.

The campaign for outreach and engagement will be implemented in conjunction with the plan for capital fundraising and construction. All the parties involved in the development and fundraising for the Remarkable Women's Exhibit will be key players in the plan to build awareness of the new museum under development. The significant number of initial stakeholders will be greatly expanded by a plan to create advisory councils to secure input and involvement in the project, and support, from constituencies throughout California. We will create a network of advocates and stakeholders across the state who will generate interest in the concept and build anticipation of the opportunity to participate in the new museum.

Initial planning calls for a meaningful promotion and communications budget of at least 5% of the total operating budget in order to achieve the institution's promotion and development goals. But the impact of advertising and promotion will be multiplied by the museum's program offerings. These will be of interest to communities and constituencies everywhere in California, and these interested constituencies will assist in the dissemination of information and the recruitment of audiences.

The museum will tell the stories of California women and will serve as a venue for the display of material from public and private collections. The exhibition and program calendar will encourage broad grassroots promotion through sustained collaboration with women's organizations and networks. The current *California's Remarkable Women* exhibit has demonstrated the public relations potential of telling the stories of California women. We have succeeded in placing articles and announcements in a more than thirty local, ethnic and professional newspapers and bulletins. With a sustained promotional strategy, the program of the California Women's History Museum will enjoy ongoing "earned media" opportunities in publication and electronic media in communities in every region and market of the state.

## **QUESTION FIVE -- TASKS, BUDGET AND MATCHING REQUIREMENT**

### **1. WHAT ARE THE TASKS OF YOUR PROJECT AND YOUR TOTAL PROJECT BUDGET?**

The overall project scope includes planning, research, design, development and construction of approximately 17,000 square feet of permanent interpretive museum exhibits.

The total project value is \$15.195 million.

This application is for the amount of \$375,000 to support project planning and to prepare preliminary working drawings.

The specific products to be achieved with the funds requested in this application are complete project planning, research and design, and the preparation of preliminary construction documents (designs and specifications) sufficient to define the scope, content and budget of the final exhibit construction project.

The applicant anticipates submitting a follow-on request to the California Cultural and Historical Endowment during a future grant cycle for a portion of the funds required to construct the project.

The funds requested under this application will be used for planning and design work necessary for the future construction of capital assets. As such, they are incidentally but directly related to construction, and are eligible for funding from the California Clean Water, Clean Air, Safe Neighborhood Parks and Coastal Protection Act of 2002.

<b>Task Description</b>	<b>Task Budget</b>	<b>Itemized list of funding to complete task</b>	<b>CCHE Funding</b>	<b>Matching Funds</b>	<b>Deliverables</b>
Initial project research and analysis	\$60,000	1. Donated funds 2. CCHE funds (same for all)	\$30,000	\$30,000	Consultant to meet with key staff and stakeholders; prepare findings, agree on final project scope and plan
Concept design development Stage I	\$100,000	same	\$50,000	\$50,000	Preliminary concept report
Concept design development Stage II	\$250,000	same	\$125,000	\$125,000	Final concept report
Design documentation Stage I	\$340,000	same	\$220,000	\$220,000	Design development; preliminary working drawings

<i>Total budget for this phase of project</i>	<i>\$750,000</i>	<i>1. Donated funds 2. CCHE funds</i>	<i>\$375,000</i>	<i>\$375,000</i>	<i>Completes study, planning and preliminary design</i>
(Items below this line will be part of a future construction phase, and are not included in this request)					
Design documentation Stage II	\$950,000				Final design, final construction documents
Architectural and engineering services	\$150,000				Design building/ structural improvements
Demolition and rough-in work	\$935,000				Remove/relocate existing exhibits and structures
Contract administration and contract management	\$800,000				Monitor construction activities
Agency/client retained items	\$270,000				Museum and SoS curatorial services: remove, store objects; physical site security
Fabrication and installation	\$10,500,000				Construction and installation of new exhibits
Construction contingency @ 8%	\$840,000				
Total Project Cost	\$15,195,000				

## **2. HOW WILL YOU MEET THE CCHE MATCHING FUND CONTRIBUTION REQUIREMENT?**

Matching funds necessary to implement this grant application will be derived from charitable donations solicited by the project sponsors and applicant.

The amount of \$375,000 will be needed to meet the CCHE 1:1 match requirement for this grant.

Approximately \$450,000 was raised from private sources during a four-month period in early 2004 to support development of the *California's Remarkable Women* exhibit. This performance demonstrates the depth of public and philanthropic interest in the subject, and has established a prequalified key donor base for the present project. Additional prospective donors are being evaluated and qualified at the present time. These developments cause the applicant to feel an appropriate degree of optimism that the necessary match funds will be forthcoming should this application be funded by CCHE.

The applicant does not wish the brevity of this response regarding matching funds to convey an impression that it does not take this matter seriously. The applicant understands that it is critically important to meet or exceed the CCHE match requirements in a timely manner. Prospective donors have been identified, and will be contacted pending the award of the grant requested by this application. The applicant is extremely confident that these funds will be forthcoming and available by the time the Grant Agreement is ready to be executed.

## QUESTION SIX -- PROJECT TEAM AND SUPPORTING DOCUMENTS

The California Women's History Museum project will be implemented by the same team that created the *California's Remarkable Women* exhibit, augmented by qualified professional consultants in the areas of museum management and interpretive planning and design.

The central institutional component of this team is the Board of Trustees and staff of the Golden State Museum Public Benefit Corporation (GSMPBC). This organization operates the California State History Museum, is the applicant for the present grant request, and will be the developer and operator of the California Women's History Museum.

Key collaborators in making the women's museum project a reality will be the Office of the Secretary of State, the California State Archives, California State Parks and the office of First Lady Maria Shriver.

A highly diverse group of advisors, scholars, resource people, theorists, storytellers and researchers, all women and all with a deep commitment to the issue of interpreting women in California history, came together for the *California's Remarkable Women* project. This group will be reactivated and expanded to help steer and inform the development of the California Women's History Museum.

Finally, but far from last in importance, a leading museum organizational development firm and one of the nation's most celebrated and sought-after museum planning and design firms have agreed to help plan and design the California Women's History Museum. Museum Management Consultants has provided initial consulting services and will continue in an advisory capacity, and the internationally-recognized ESI Design has agreed to serve as the project's principal designer. This project is fortunate to have been able to attract companies of this caliber to its service.

As the museum project progresses and increases in complexity, additional professional consultants and advisors will be engaged to support the range of needs that emerge. This will provide opportunities for other firms and voices to assist and inform the project.

### Core Project Team Members:

Golden State Museum Public Benefit Corporation (dba the California State History Museum)

J. Terry Eager, Chairman, Board of Trustees  
Ross McGuire, Museum Director  
Amanda Meeker, Curator

### ESI Design, Inc.

Edwin Schlossberg, Principal Designer  
Frank Migliorelli, Interactive Designer  
Clay Gish, Project Writer  
Jan Burdick, Project Manager

Museum Management Consultants, Inc.

Adrienne Horn, President

Diane Frankel, Senior Vice-President

## **PROJECT TEAM PROFILES**

### **J. TERRY EAGER, CHAIRMAN, BOARD OF TRUSTEES, GSMPPBC**

J. Terry Eager is the Chairman of the Board of the California State History Museum. He is a CPA, recently retired partner of Price Waterhouse, Sacramento. Mr. Eager will coordinate the work of the Board in the development of policy and priorities for the California Women's History Museum project, and he will be the direct supervisor of the Museum Director. Mr. Eager has considerable experience in business planning and non-profit governance, and serves on the Board of the UC Davis Foundation, the UC Davis Graduate School of Management, Dean's Advisory Council.

### **ROSS MCGUIRE, MUSEUM DIRECTOR, GSMPPBC**

Ross McGuire is the Director of the California State History Museum. He will have staff responsibility for project management in the planning of the California Women's History Museum. Mr. McGuire has graduate training in history and has 29 years of experience in the museum profession, including 19 years as the director of three museums. He has led capital and program planning efforts for two museum projects. He is a reviewer and site committee chair for the Accreditation Program of the American Association of Museums. A search for the CEO of the new California Women's Museum has been launched: following the appointment of this person, Ross McGuire will transition to a senior management operations role to support the planning, construction and operation of the new museum.

### **AMANDA MEEKER, CURATOR, GSMPPBC**

Amanda Meeker is the Curator, with responsibility for the development and maintenance of temporary and permanent exhibitions at the California State History Museum. Ms. Meeker has a master's degree in Public History, and ten years of experience in the field including a staff position with the firm that developed and constructed the permanent exhibits of the Golden State Museum (now the California State History Museum). Ms. Meeker was recruited to serve as Associate Curator when the Museum opened in 1998, and was promoted to Curator in 2000. She performs graphic design, editing and exhibit design and installation duties along with her research and interpretive work. Ms. Meeker provided curatorial services to the *California's Remarkable Women* exhibit project and will play a key role in the development of the California Women's History Museum program.



## **GOLDEN STATE MUSEUM PUBLIC BENEFIT CORPORATION**

The Golden State Museum Public Benefit Corporation (GSMPBC) was established in 1997 to support and operate museum facilities in a public-private partnership with the Secretary of State. The purpose of the corporation and the public private partnership was authorized in chartering legislation (SB 648, 1995). The roles and responsibilities of the GSMPBC and the Secretary of State are defined in a Memorandum of Understanding, established in 1997. The corporation has the responsibility for the ongoing development, operation and support of the Museum. GSMPBC has hired staff to operate the Museum and to develop and deliver educational programs. The corporation dedicates its earned and contributed income to support the Museum's operation. The Agency funds the indirect costs to operate the facility. The private non-profit operating structure provides a flexible, responsive and highly cost effective model for the operation of a state cultural facility. A Board of up to 36 trustees, who serve up to 2 non-renewable 3-year terms, governs the corporation. Trustees are recruited with the goal to secure representation from throughout California, and to engage the participation of key constituencies in the governance and support of the Museum. The trustees have joined the Secretary of State in endorsing the plan to create the California Women's History Museum. The Board is taking steps to align the purposes of the corporation with the new programmatic plan and they have resolved to commit the resources of the corporation to the development and operation of the California Women's History Museum.

### **ADRIENNE HORN, PRESIDENT, MUSEUM MANAGEMENT CONSULTANTS, INC.**

Adrienne Horn has served as a consultant to museums for the past twenty-five years. She has extensive experience in the areas of leadership issues, organizational development, educational program planning for youth and adults, market analysis, governance, and project management. She is particularly adept at analyzing organizational issues and strategizing with leadership to enhance institutional performance.

### **Diane B. Frankel,**

*MMC Senior Vice President*, has over twenty-five years of experience in the nonprofit arena: as a funder at the national and state level, as a museum director and museum trustee, and as a director of a graduate program in museum studies. These experiences enable her to provide clients with a unique perspective on the fundraising process and how to be successful in obtaining funds from large foundations as well as private donors. Diane also has extensive experience in strategic planning and organizational development.

### **MUSEUM MANAGEMENT CONSULTANTS, INC.**

Museum Management Consultants, Inc. (MMC) is nationally known for its expertise in all aspects of planning, audience building, program development, and executive search. Founded in 1987 and based in San Francisco, California, MMC provides consulting services to art, history, and science museums, zoos, and other nonprofit cultural institutions

throughout the United States. The firm works with institutional leaders to enhance organizational performance, build community relationships, and attract larger and more diverse audiences. MMC works to help its clients thrive in a competitive and changing marketplace

**EDWIN SCHLOSSBERG, PRINCIPAL DESIGNER, ESI DESIGN, INC.**

Edwin Schlossberg is an internationally recognized designer, author and artist. He and the team at ESI help clients define the experiential goals for the project and then create unique metaphors and concept designs to shape the overall visitor experience.

For more than 25 years, and long before the concept of interactivity came into vogue, Ed designed interactive, participatory visitor experiences. In 1977, he designed the Brooklyn Children's Museum, creating one of the nation's first hands-on learning environments. Since that time, he has created experiential designs for museums, corporations, parks, websites, retail environments, entertainment complexes and public spaces. He also frequently publishes, speaks and consults on the topic of experiential design.

**FRANK MIGLIORELLI, DIRECTOR OF INTERACTIVE DESIGN, ESI DESIGN, INC.**

Frank Migliorelli guides and oversees the design and development of media and software elements for ESI's projects. Frank has over 17 years of experience in interactive technology design and production, including the development of over 50 CD-ROM and video titles for children. He joined ESI in 1999.

Since joining ESI, Frank has been involved in many design projects, such as the Children's Museum of Los Angeles, websites for the JFK Presidential Library and General Motors, and an interactive exhibit program at St. Paul's Chapel in New York City. Frank has also led many internal R&D initiatives, such as the development of creative applications for wireless technologies and innovative broadband programming for children.

Frank currently teaches interactive media design at New York University's Interactive Telecommunications Program, and has previously taught at NYU's Steinhardt School of Education and at the School of Visual Arts.

**CLAY GISH, DIRECTOR OF WRITING & RESEARCH, ESI DESIGN, INC.**

Clay Gish oversees the development of content, educational goals and scripting for ESI's exhibit programs and educational materials. She holds a PhD in History from New York University. Prior to joining ESI, Clay worked as a journalist, editor and teacher. During her

7-year tenure at the American Foundation for the Blind, she edited numerous books and a journal for professionals in the field. She also wrote articles on issues confronting people with visual impairments, including a groundbreaking series on environmental barriers. In addition, Clay has published several articles on child labor during the Industrial Revolution. Clay joined ESI in 1989.

Since joining ESI, she has led the writing team on a great variety of projects including Sony Plaza/Sony Wonder, the American Family Immigration History Center (AFIHC) at Ellis Island, the Old Barracks Museum and the Pope John Paul II Cultural Center. She is actively working on the design of a new educational center at the John C. Stennis Space Center.

#### **JAN BURDICK, PROJECT MANAGER, ESI DESIGN, INC.**

Jan Burdick benefits from a 20-year background overseeing exhibit and software development projects. She has a dual background in software development and theater and dance production. Prior to joining ESI, she produced software and curriculum materials for educational publishing companies. She joined ESI in 1988.

Since joining ESI, Jan has managed a broad range of projects including the American Family Immigration History Center (AFIHC) at Ellis Island, the Chicago Symphony Orchestra, the John F. Kennedy Center for the Performing Arts and the September 11th Memorial for the New York Presbyterian Hospital. She also has extensive experience working with regulatory and historic preservation agencies, such as the National Parks Service, and with architects and construction management firms to ensure a project's successful implementation. She is currently managing the development of a new exhibit program for Ellis Island.

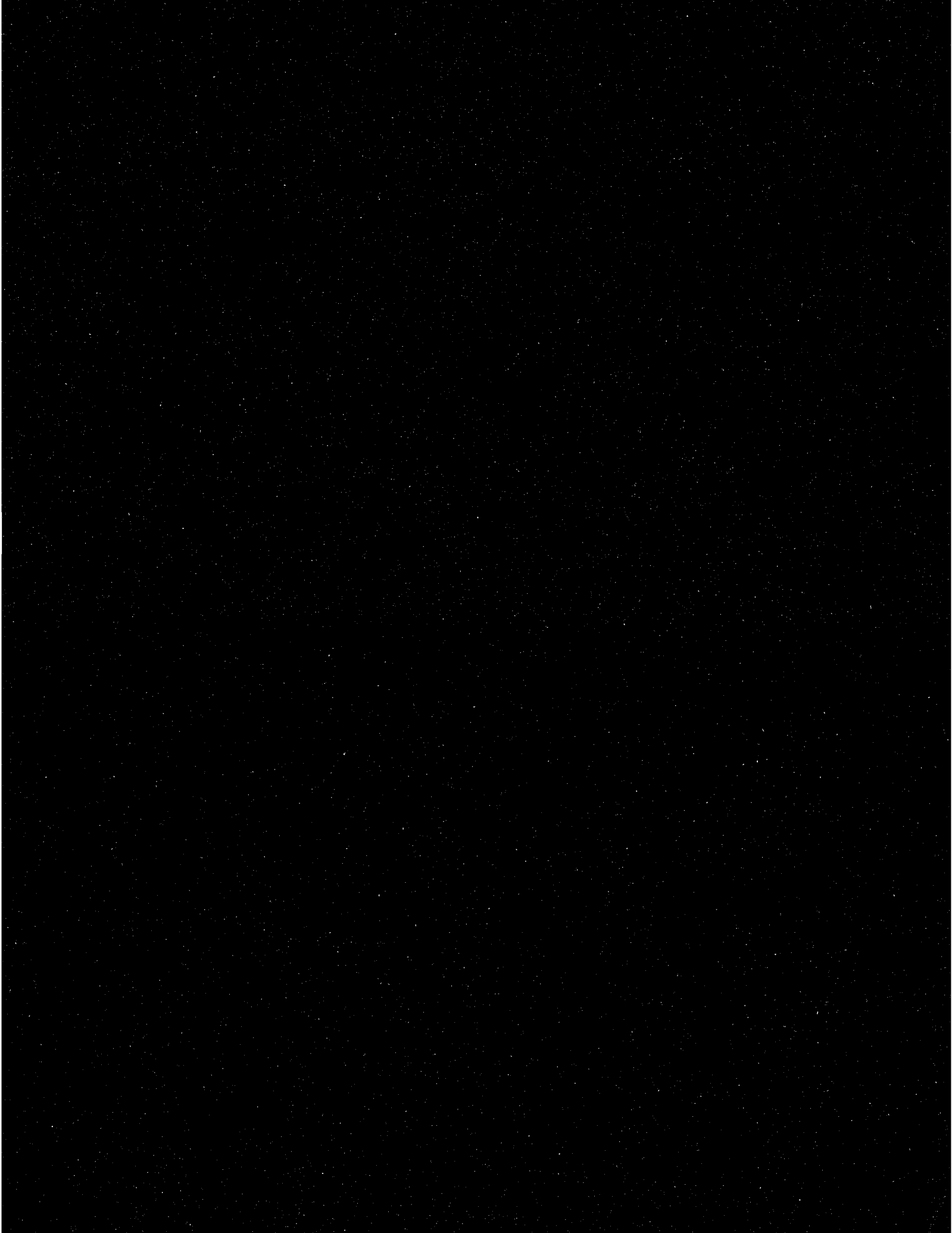
Jan has taught at the New School University, Fairleigh Dickenson University, and Marymount Manhattan College.

#### **ESI DESIGN, INC.**

ESI Design is one of the world's foremost experiential design firms—it creates physical and virtual spaces for people to interact, exchange ideas and learn from each other.

ESI designs for a wide variety of environments. The client list includes museums, retailers, corporations, real estate developers, parks, hospitals, foundations and so on. The firm works with clients whose business and strategic challenges will benefit from an innovative ESI design solution. For example, ESI invented an experiential retail environment for Sony and designed a museum wide multi-player exhibit for the Children's Museum of Los Angeles.

ESI's team of 50 professionals includes physical, graphic and interactive designers, systems specialists, marketers, writers and educators. Diversity is the key to creativity: it is the reason ESI's designs are applauded, analyzed, published and enjoyed by millions of individuals every day.





**Part One - CCHE Face Sheet**

**Page One of Two**

**California Cultural and Historical Endowment  
Grant Application Face Sheet**

Applicant Name:  
(Organization or Public Agency) City of Inglewood

Applicant Address: Parks, Recreation & Community Services  
One Manchester Boulevard  
Inglewood, CA 90301

Public Contact  
Regarding this Project: Kevin L. Hawkins, Director

Public Contact Telephone: (310) 412-8750  
Facsimile: (310) 330-5750  
Email: khawkins@cityofinglewood.org

Non-profit Organization Federal  
Employer Identification Number: 95-6000728

---

Name of Project:  
(Short Title) Inglewood Historical Mural Preservation

Project Amount:  
(Total Amount of Project) \$1,271,250

Amount you are Requesting from  
CCHE: \$160,000

Project Location:  
(indicate exact address,  
City and County) Manchester and Grevillea, Inglewood, 90301  
Los Angeles County

Anticipated Project Start Date: July 15, 2003  
(if you have already initiated your project, indicate that date)

Anticipated Completion Date: December 31, 2005

Location Latitude and Longitude: -118.325, 33.96

Website Address (if applicable) www.cityofinglewood.org

**Part One-CCHE Face Sheet**

## Page Two of Two

Brief Project Description:(please use the space provided below)

The City of Inglewood requests \$160,000 from the California Cultural and Historical Endowment in order to achieve the following goals:

- Complete the restoration of the city's historic mosaic mural, "The History of Transportation";
- Facilitate the mural's placement in a safer and more appropriate location by enabling the completion of a new support wall for the mural;
- Build an interpretive kiosk for the display and distribution of educational materials pertaining to the mural.

"The History of Transportation", created in 1939-1940 for the Works Progress Administration (WPA) by famed California artist Helen Lundeborg, is a local landmark of significant historic and cultural importance in a city whose role in California's history has been largely neglected. The 8-foot high, 240-foot long mural is both a significant historical artifact and an interpretive tool in its own right, manifesting the connections between the progress of transportation and the evolution of California's history and prosperity. Dedicated to "The Pioneers of the Centinela Valley", it depicts the modes of transportation that define the historical development of California broadly and Inglewood specifically. Both a progression in time and a parade of life-size figures, the mural begins in the California Mission period and ends in the age of aviation, as passengers prepare to board a DC-3 airplane. As an artifact, the mural ties together many important but underrepresented threads of California's story, including the role of the WPA and the Federal Arts Project in the Great Depression era, Inglewood's contribution to aviation and the national defense, the uniquely Californian medium of petrachrome mosaic, the modernist arts movement in California, and women in the arts.

Since 1940, the mural had been located at a local park that at the time was a lively hub of rail and automotive transportation with links to nearby air and sea transport. Over time, construction of four major freeways and other infrastructure changed the context of the mural's surroundings, leaving it isolated and vulnerable to vandals and severe tagging by gang members. Car collisions and the elements also damaged the mural. More than \$1 million and countless volunteer hours have already been devoted to the goal of restoring the mural and putting it back on public display in the context of the artist's intentions. The requested CCHE funding represents the last hurdle in a 16-year effort to preserve and restore this unique piece of California's history and culture.

### CCHE Use Only:

Department Reference No.: \_\_\_\_\_  
Bond: \_\_\_\_\_  
Budget Year: \_\_\_\_\_  
Award Date: \_\_\_\_\_  
Type of Award: \_\_\_\_\_  
Project Type: \_\_\_\_\_

**Question One - Project Description and Project Goals - Please state the benefit and contribution your project will have toward the overall goal of enhancing the threads of California's culture and history, and how your project goals will achieve this.**

The City of Inglewood requests \$160,000 from the California Cultural and Historical Endowment in order to achieve the following goals:

- Complete the restoration of the city's historic mural, "The History of Transportation";
- Facilitate the mural's placement in a safer and more appropriate location by enabling the completion of a new support wall for the mural;
- Build an interpretive kiosk for the display and distribution of educational materials pertaining to the mural.

"The History of Transportation", created in 1939-1940 for the Works Progress Administration (WPA) by famed California artist Helen Lundeberg, is a local landmark of significant historic and cultural importance in a city whose role in California's history has been largely neglected. The mural is both a significant historical artifact and an interpretive tool in its own right, manifesting the connections between the progress of transportation and the evolution of California's history. The mural is literally concrete evidence of Inglewood's pivotal but little-known role in California's story, including the city's role in the aerospace industry and national defense.

Measuring 8 feet high and 240 feet long, the "History of Transportation" petrachrome mosaic mural is the largest created by Lundeberg, a leading California painter and pioneer of modernism. The mural is made of 60 petrachrome panels, 4 X 7-1/2 feet high, affixed with steel and cement to a freestanding supporting wall. Petrachrome, a uniquely Californian media invented by artist and WPA/Federal Arts Project state supervisor Stanton MacDonald Wright, was used for only a few years due to the inherent expense and number of workers involved. It is a combination of cement, aggregate (very small stones) and pigment that was poured to create colored areas or colored lines, and when set, was extremely durable and appropriate for outdoor murals. Various sizes of aggregate were used to simulate the look of rough cloth, wood, hair, metal, skin, and other textures. The mural, the largest WPA artwork that had yet been attempted, was a complex undertaking that involved scores of workers laboring for months under Lundeberg's supervision to create the historically accurate depictions of human figures, animals, vehicles, clothing, and buildings. It is one of only three remaining petrachrome murals in the world.

Dedicated to "The Pioneers of the Centinela Valley", the mural depicts the modes of transportation that define the historical development of California broadly and Inglewood specifically. Both a progression in time and a parade of life-size figures, the mural begins in the California Mission period and ends in the age of aviation, as passengers prepare to board a DC-3 airplane. The mood of the mural is light, communicating the pleasure and satisfaction that Americans take in the ability to progress through technology. The mural acknowledges the diverse peoples who have historically populated the Centinela Valley: Native Americans, Spanish, Mexican, White and Black (though, true to its time, the mural only shows Blacks as train porters, not as passengers). The details of the mural are historically accurate: for example, Native Americans of the Mission period are shown moving their encampment using the tools, dress, and modes of transport of that period. (Please see attached photos.)

Since 1940, the mural had been located at Centinela Park (later re-named Edward Vincent Jr. Park), which at the time was a lively hub of rail and automotive transportation with links to nearby air and sea transport. In the ensuing decades, construction of four major freeways and other infrastructure changed the context of the mural's surroundings, leaving the magnificent artwork increasingly isolated. This isolation led to its vulnerability to vandals and to severe tagging by gang members. Car collisions and the elements also took their toll.

Despite the determined efforts of a dedicated citizens group formed to save the mural (the Historic Site Preservation Committee), the mural continued to languish. Inglewood's fiscal constraints, stemming from its low tax base, the exodus of the aerospace industry, and three economic recessions, precluded city from being able to take on the tasks of restoring the mural and moving it to a location more appropriate to the intentions of its creators.

Thankfully, neither the city nor the Historic Site Preservation Committee gave up on their vision for the mural. Grants from the J. Paul Getty Museum, the California Urban Recreational and Cultural Centers Program, and the California Heritage Fund together provided over \$1 million to restore the mural to its former glory and move it to Grevillea Park, which is undergoing a planned conversion into a city Art Park with the mural as its centerpiece. There, it could once again be enjoyed by thousands of viewers daily, as the park is located at a hub of various modes of transportation, and is across the street from City Hall, a public library, a high school, residential apartments, and churches, as well as being adjacent to the Market Street historic district. However, the extent of damage to the mural was unfortunately not revealed in the initial study of its condition funded by the Getty grant. The panels removed as part of the investigation did not reflect the extensive decay that occurred inside many of the panels to the internal rebar that connected the panels onto the mural wall. Thus, while the restoration of the mural panels' visible surface continues to proceed with great success, the unforeseen additional expenses mean that the city now lacks sufficient funds to complete the new support wall, the replacement/restoration of the internal rebar for connecting the panels to the new wall, and the construction of the planned interpretive kiosk.

The requested \$160,000 in CCHE funding will be used to complete the following tasks:

- \$45,000 - Complete the restoration of the mural's internal components by purchasing additional rebar, refurbishing original rebar where feasible, and welding the new rebar in place.
- \$75,000 – Provide poured-in-place concrete for the construction of the mural's new support wall. (Note that this figure represents only the cost associated with the poured-in-place method as required by the California Office of Historic Preservation. The total wall construction cost is \$275,000.)
- \$40,000 – Design and construction of an interpretive kiosk.

With more than one million dollars and countless volunteer hours already dedicated to the project, the requested funds will be highly leveraged, and will constitute a very high ratio of benefit per CCHE dollar requested. The proposed project is consistent with all state and federal requirements, including Americans with Disabilities Act (ADA) accessibility requirements. As part of the overall Art Park project, the mural's relocation will feature appropriate interpretive signage and lighting to further draw attention to this important historical resource. The mural, along with the kiosk, will have an expected useful life of multiple decades before any further major renovation is necessary, and will be a central focus for community activities. These activities include the mural's reinstatement on tours conducted by the Los Angeles Mural Conservancy, inclusion in the annual Inglewood Arts Festival activities, and its continuing role as part of a cooperative oral history project conducted by UCLA, the city, and students at Inglewood's high schools. The mural is expected to have more than 500,000 viewers annually.

Inglewood has a median income nearly 50 percent less than that of California as a whole. Over the years, the city has received very little state and federal grant funding compared to other cities of comparable size. Funding of the proposed project will give vital assistance to a city of very limited means as it struggles to complete a sixteen-year effort to save a unique piece of California's history and culture.



**Question Two: Project Audience and Needs Assessment** – *Please describe your project audience and illustrate the critical needs your project will address.*

**ience:** The audience for the “History of Transportation” mural will include: visitors to City Hall and the Inglewood Public Library (both located across the street from the mural’s planned location); participants in LA Mural Conservancy tours; Inglewood Arts Festival attendees; students at Inglewood High School (also located across the street from the mural) and the 18 other public schools in Inglewood, which will include the mural in their art appreciation curriculum; thousands of motorists and bus passengers passing through the transportation hub at Grevillea Park (as the mural’s name and dimensions imply, it was designed to be enjoyed by transportation users on the move); visiting art enthusiasts; users of Grevillea Park; and citizens of Inglewood generally.

The total number of individuals that will view the mural each year is estimated at more than 500,000. The Inglewood Arts Festival alone draws more than 6,000 – 7,000 attendees, and will prominently feature the mural in its activities. The mural is well-known within the community, and is the object of much public interest and affection. Major articles on the mural have appeared in the Los Angeles Times (front page of the Calendar section), Art and Review, and other publications. The city, in cooperation with the Historic Site Preservation Committee, the Chamber of Commerce, and other citizens groups, has publicized the mural restoration efforts, and will continue to promote the mural as the centerpiece of the new Art Park and as a point of historical and artistic interest. The mural will also be publicized in conjunction with Inglewood’s adjacent Market Street historic district, which consists of several blocks of commercial structures built between the 1920’s and 1940’s, the owners of which are encouraged to maintain or restore their buildings to reflect the period in which they were built. Market Street is the first such district in Los Angeles County to receive a National Main Street Program designation.

ew audiences will also be reached through cooperation with the Los Angeles Mural Conservancy. Years ago, the Conservancy featured “The History of Transportation” on its mural tours of the Los Angeles area, until the mural had become so defaced with graffiti that it was no longer feasible for inclusion. The Conservancy has pledged that when the mural is restored, it will once again be included on the tours, with the Art Park/Market Street featured as a lunch stop. The economic dividends associated with publicizing the mural as a tourist attraction will ensure its continued promotion to new audiences by the Market Street business community.

As noted previously, the mural is the subject of an ongoing educational project involving the Oral History Department of the University of California at Los Angeles (UCLA) and Inglewood’s high school students. Students record interviews with members of the mural’s original construction crew and other long-time community members to gain a wider perspective on the mural, the community, and civic spirit, as well as to preserve historical information. These students also write and act in plays about the mural, which are performed at community events, thus further increasing public awareness and interest concerning the mural.

**Need for the Project:** The proposed project will address the following critical needs:

- It will **preserve a rare and unique artifact, one of the last remaining structures of its kind.** As noted previously, the mural is one of only three petrachrome murals still in existence, and is also unique in its subject matter, its place in the history of the WPA Federal Art Project in California, and as a link to Inglewood’s aerospace heritage. Inglewood was home to North American Aviation, which played an extremely significant part in the development of military and commercial aircraft, as well as space exploration. (Please see Question Three for further discussion on this topic).
- It **restores a historical artifact that has suffered severe deterioration or neglect.** The requested funding will allow the completion of a 16-year effort to undo the damage done by car collisions, the elements, and graffiti that obscured two-thirds of the mural surface.
- It **provides support for a project complying with the Secretary of Interior’s Standards for the Treatment of Historic Properties.** As a recipient of a California Heritage Fund grant, the city has

worked very closely with the California Office of Historic Preservation (COHP) in restoring the mural. COHP has monitored the restoration to ensure that all state and federal standards for historic preservation are met.

- **It shares an important story in the voice of the first person.** The kiosk to be built as part of the project will feature interpretive materials that include excerpts from interviews with Lundeborg, in which she explains the historical background, underlying ideas, artistic style, construction process, and anecdotes illustrating the public attitudes of 1939-40. The interpretive materials will also include ways to gain further information, including information on community plays in which actors depict Lundeborg in the process of creating the mural.
- **It preserves a project that “does not harm” the original integrity and significance of historic structures and districts.** As previously discussed, the context of the mural’s original location had changed over time from being a lively transportation hub to being rather isolated. The movement of the mural to Grevillea Park, located along the main thoroughfare between Inglewood and downtown Los Angeles, under the flight path to LAX, with bus stops at the park, will restore the context of the artist’s intentions. The new location’s proximity to the Market Street historic district, filled with structures built between the 1920’s and 1940’s, also enhances the historical context of the mural.
- The UCLA/Inglewood High School oral history project, which uses the mural as a main focus of its activities, **preserves a vanishing human resource** by continuing to interview mural construction workers and long-time Inglewood residents in connection with the mural’s role in the city’s history.

The City recognizes the value of the “History of Transportation” artwork, and has already taken many steps together with the community to save this piece of its heritage. However, the City is not economically capable of completing its restoration without assistance. The per-capita income in Inglewood is approximately \$15,000, nearly 50% below the California average. Inglewood’s unemployment rate of 8% is one of the highest in the South Bay, with the average rate in surrounding Beach communities below 3%. Although there are some well-do professional residents in Inglewood, many residents are unskilled, with most workers employed in low-wage service jobs, the largest industry sector in the region. A low 36% of residents own the homes they reside in. Inglewood has no art museums or public art venues, very few art galleries, and is miles away from Los Angeles major museums and parks. Travel to any of these venues takes 45 minutes or more in congested traffic by car or bus. Funding of this project will therefore fill a significant community need, and will enable the city to finish the job of preserving an important piece of California history.

### **Question Three: CCHE Priorities – How does this project fit into the priorities of CCHE?**

#### **Priority 1. Preserve, interpret, and enhance understanding and appreciation of the significant elements that add to the State's cultural, social, and economic evolution.**

The proposed project addresses an area of California culture and history that illustrates **significant events and developments of the 20th century**. At the time of its creation in 1939, the "History of Transportation" was the largest Works Progress Administration (WPA) artwork in the nation. The WPA was established in 1935 by President Franklin Roosevelt to provide jobs and purchasing power to hundreds of thousands of unemployed people during the Great Depression of 1929-1939. It is one of the few extant murals done in petrachrome, a media developed specifically for WPA murals in California. It is an outstanding reflection of its time, accurately mirroring the development of transportation and the transportation culture as seen from the perspective of Californians in the period immediately preceding World War II. It reflects the local and regional importance of the transportation industries and its era's fascination with technological progress. It represents what the WPA did best (employ as many people as possible within their trades), and it stands, in the public's eye, for all WPA artwork in the region. Perhaps most important, unlike so many WPA artworks, it still exists.

The mural depicts **unique identifiable ethnic and other communities**. All major ethnic groups other than Asian are included. Though the various ethnicities are not depicted with the same level of sensitivity that would prevail today, the mural also serves as a historical contrast to mark **culturally significant changes** in the progression of public attitudes, a function that has its own importance.

The mural depicts **California's living cultural heritage and folk life**, from the Native Americans of the Mission Period to California's "car culture", while at the same time being part of that cultural heritage.

The mural illustrates transportation as the enabler of **California's economic strength**, the means by which prosperity and progress are achieved. This aspect of the mural has special relevance to Inglewood, which at the time of the mural's creation was home to North American Aviation, a major employer of Inglewood residents. In addition to early mail delivery and passenger planes, North American manufactured more military aircraft for the United States than any other company in history, including the famed P-51 Mustang (premiere fighter plane of World War II) and the B-25 bomber (first bomber to serve in all theaters of World War II). These transportation-related factors of Inglewood's **contributions to the national defense activities** will be detailed in the interpretive kiosk to be built as part of the proposed project.

#### **Priority 2. Preserve, document, interpret or enhance the understanding of threads of California's story and communities that are absent or underrepresented in existing historical parks, monuments, museums and other facilities.**

In addition to the story of transportation's role in California's progress, the proposed project will preserve, document, and enhance the understanding of many underrepresented aspects of California's story. These aspects include the role of the WPA and the Federal Arts Project in the Great Depression era, Inglewood's contribution to aviation and the national defense, the modernist art movement in California, the uniquely Californian medium of petrachrome, and the unique story of Helen Lundeberg, a very young and shy female California artist who in 1939 supervised an all-male work crew in creating a monumental artwork and went on to national renown in the arts.

The understanding of the proposed project will address the need of a **community where there has been a lack of public attention and funding**. Inglewood has had very little grant funding and has no art museums. Though the city has received funding to assist in building the new Art Park, its first forum for outdoor art, the city still lacks the

requisite funds to complete the restoration of the mural, which is planned as the anchor for the park's artworks. As a poor and largely (81 percent) minority community that was rocked by the tumultuous events of earlier decades, the city battles **factors influencing its treatment and the recognition of its contributions** to California's history and development, including a mistaken perception that Inglewood is an "unsafe" community. Funding of this project will help the city to be recognized both for its important but little-known historic contributions and its current viability.

**Priority 3. Achieve careful balance geographically, among communities and organizations of large and small size, and among diverse ethnic groups.**

As mentioned above, over the years there has been a **disproportionate imbalance of funding and other resources available** to Inglewood. An Urban Parks and Recreation Recovery (UPARR) grant in 2001 was the first federal competitive grant ever awarded to the city, and a grant from the California Office of Historical Preservation in 2001 for the mural preservation effort was the first competitive grant received from the state for the Parks, Recreation and Community Services Department.

#### **Question Four: Ongoing Project Maintenance and Public Accessibility**

##### **Project Maintenance - *What is your plan for financially maintaining and sustaining your project after CCHE funds are exhausted?***

As discussed previously, the requested CCHE funding covers a portion of the one-time costs associated with the restoration of the "History of Transportation" mural, construction of its new support wall, and construction of an interpretive kiosk. This project will take place within the context of the comprehensive restoration of the mural as the central piece in the city's planned Art Park and as a community treasure that will be the focus of educational, civic, and artistic activities on a year-round basis.

**Feasibility of project success:** As discussed in the response to Question Two, promotion of the mural as an object of historic and artistic interest is already an ongoing strategy in which the city local schools, the Los Angeles Mural Conservancy, the UCLA Oral History Department, and citizen groups work together to engage public interest and attraction to the project, and publicize plans for the mural's preservation and future role in the city. Articles on the mural have appeared in major newspapers (such as the *Los Angeles Times*) and major art publications (such as *Art and Review*). These publicity efforts will only increase once the mural is restored and in public view.

A restored, widely recognized landmark two blocks away from the historic Market Street shopping district and within five miles of LAX would be an economic boon to the city. The mural's planned prominence at the Inglewood Arts Festival and as an attraction for art enthusiasts, history buffs, and other tourists will help ensure the continuing support of the business community, particularly the Chamber of Commerce and the Market Street business community, in promoting the mural to a wide audience.

Several articles, with pictures, have run in local community newspapers throughout southern California. A national art magazine, *American Art Review*, is scheduled to run a story about the mural in its next issue, and *Westways* magazine is also planning an article closer to reinstallation of the mural. The mural has been featured on one television public affairs program, is scheduled to be featured on another, and will be a feature of Huell Howser's public television program, "California's Gold," after its installation. If the project is approved for funding, travel and lifestyle magazines such as *Sunset*, as well as other print and electronic media, will also be contacted ahead of time to enable them to run articles on the mural's debut. The mural will also be the focus of much attention during the city's centennial celebration in 2008.

This project has been strongly supported by the Inglewood community for years, both by individuals and nonprofit groups such as Inglewood Cultural Arts and the Historical Society of the Centinela Valley. Since 1988, when the Historic Site Preservation Committee was formed to save the "History of Transportation" mural, its members have included Parks and Recreation Commissioners, members of the Historical Society of the Centinela Valley and Inglewood Cultural Arts, local activists, artists, architects, educators, and other concerned citizens. In future months, the Committee will be expanded to involve additional residents to plan how the city, the school system, churches, businesses, local artists and other organizations can make the best use of the mural and Art Park. Special emphasis will be placed on engaging educators to incorporate the mural into a lifelong learning opportunity starting in their schools. The support of Dr. Alma Davis, Chief Academic Officer in charge of curriculum for the Inglewood Unified School District, will facilitate this process.

**Financial maintenance of the project:** The mural and kiosk will be located in the city's Art Park, which will be maintained by both the Public Works and the Parks, Recreation and Community Services Departments. Funds for the maintenance of the artworks themselves will be allocated in a special fund supported by a new Percent for the Arts ordinance, whereby developers must pay one percent of the cost of their development into this fund. These funds will be used in part for the services of Sculpture Conservation Studios as mural conservators. The Parks, Recreation and Community Services Department and the Public Works Department will allocate workers for the routine maintenance of the mural.

***How ongoing operation and maintenance will be conducted:*** In regard to the physical maintenance of the mural and kiosk, the specially trained Public Works department staff will conduct regular inspection and maintenance, in cooperation with art conservators. Thanks in part to the characteristics of the mural's planned location at the new Art Park (which include appropriate lighting to showcase the mural and high levels of activity in the area that will discourage vandalism), the cost of physical maintenance is expected to be comparatively low.

At the time of its placement, Sculpture Conservation Studio will apply anti-graffiti coating to the entire surface of the mural. The coating is Prosoco Product, a sacrificial coating (SC-1). It is a thin liquid for spray application to porous and textured surfaces. It allows protection of the overall area and spot application with no changes in color or appearance. The City will have a maintenance contract with Sculpture Conservation Studio for an annual inspection and follow-up. Maintenance will include a dusting and hand-washing of the mural with water and ORVUS detergent, which is biodegradable and ph-balanced, followed by a water rinse. The cost of maintaining the mural and kiosk will be provided as part of the city's budget.

***Experience and resources of staff:*** The overall director of the project is Kevin Hawkins, Director of Parks, Recreation, and Community Services. Because of the special expertise required to conduct the mural restoration and build the new support wall and kiosk, the city will hire expert specialists to do these jobs. Please see Questions Five and Six for additional detail on these specialists and their qualifications.

***How staff will be maintained after CCHE funds are exhausted.*** No CCHE funding is requested for staffing costs.

***CEQA compliance:*** The project is in full compliance with the California Environmental Quality Act (CEQA), having already received a categorical exemption (Class 3: Existing facilities -Section 15301). The notice of exemption was prepared in accordance with California Environmental Quality Act Section 15300, and Inglewood City Council Resolution No. 6631. The notice was posted from May 27, 2003 until June 28, 2003 by the Los Angeles County Registrar-Recorder and signed by the Los Angeles County Clerk.

**Public Accessibility -What is your plan for making your completed project accessible to the public?**

Grevillea Park is served by five major bus lines and the City's free I-Line Shopper's Shuttle. The MTA 115 and 215 lines run east and west along Manchester and make a stop at the park. The 111 runs on Florence, north of Manchester. (Please refer to project area map in Visual Description attachment). The 117 bus runs along Century, bringing people from LAX airport. The 212 bus runs north and south along La Brea, one block east of the park, and connects with the Green Line Metro Rapid Transit stop on Hawthorne Blvd., the southern extension of La Brea. The 211 bus runs along Prairie, east of La Brea. The I-Line bus loop used by seniors, youth and other residents runs along Market Street, two blocks away from the mural.

Wheelchair access to the park is provided by pavement ramps already built into all street corners. The pathways into the park will be wide and smooth enough for easy maneuverability, and will meet all ADA requirements.

Two large parking facilities are available, one across Manchester near City Hall, and one three blocks away on Locust Street. Additional street parking is also available.

Inglewood is easily reached from other parts of Los Angeles via the 405 and 110 freeways (N/S) and the 105 and 10 freeways (E/W). The area is served by major connector roads including La Brea, La Cienega, Prairie and Crenshaw (N/S), and Florence, Manchester, Century, and the Imperial Highway (E/W) and many buses as noted above. The Green Line Metro Rapid Transit stops just south of Inglewood at Hawthorne Blvd. (the southern extension of La Brea) and Imperial Highway. Los Angeles International Airport and many quality hotels are a mile west of Inglewood on Century Blvd.

The Art Park will be open to the public 24 hours a day with plenty of night lighting available. The Police Department is less than two blocks away, just northeast of the park site.

**Plans to involve the local community in utilizing the project:** As discussed earlier, the public will be involved in utilizing the project in numerous ways, including the oral history project conducted in cooperation with UCLA, the Inglewood Arts Festival, Los Angeles Mural Conservancy Tours, community plays about the mural, and its location at a major transportation hub. In addition, by moving the mural to Grevillea Park and building a new Art Park around it, the City will create a major artistic focal point for its citizens and a much-needed outdoor venue for artistic performances. The City currently does not have any medium-sized venue for concerts and outdoor ceremonies. The Art Park will meet this need, bringing in many additional visitors to the mural. Ongoing plan to tell the story over a period of time: As part of the project, the interpretive kiosk to be constructed will be an ongoing storytelling device. The kiosk will include a variety of printed materials that will include not only information about the mural and its historical background, but also the many stories that are linked to it in various ways, such as the roles of North American Aviation in World War II and the space program, Charles Lindbergh's flight of the first plane to land at Mines Field (then a part of Inglewood, it later became LAX), and the Modernist art movement in California.

The project's ongoing story will also be told in schools. In addition to the oral history project and community plays performed by high school students, the mural will provide a major new focus for arts education in Inglewood's 19 schools, where arts programs have recently been reinstated after years of neglect. Having this mural restored will offer parents, teachers and children the opportunity to discover the work of an important California artist, and learn about the historical movements that have shaped their city and their times. In addition to field trips for schoolchildren and drawing classes for all ages, the city will work with Inglewood Unified School District to ensure that the mural will continue to inspire a sense of discovery in social studies, history and art classes on topics from how technology changed life in Inglewood and how the WPA program affected California to the role of unions and the artist in society.

***Plans to keep the public aware and informed of the project:*** If approved for funding, the project will be featured on the city's website and newsletter, community access television stations, and multiple additional media outlets. Please see discussion under "Feasibility of project success" above.

***Fees:*** No fees will be charged to enjoy the mural or the Art Park.

***Days, times and hours of operation:*** The mural will be available to the public 24 hours a day, seven days a week. Although a decorative iron fence will keep the mural safe from vandals and taggers after dark, it will be illuminated at night and clearly visible.

***Plans to offer the facility to a large and diverse public audience:*** As previously discussed, more than 500,000 people from all walks of life will view the mural each year. 57,000 people take city arts classes or attend arts events. Such events will expose all attendees to the mural and its interpretive panels.



**Question Five - What are the tasks of your project and your total project budget?**

**1. Chart of Tasks/Budget**

Task Description	Task Budget	Sources of Funding			CCHE Funding	Match	Deliverables
		OHP	URCC	City Parcel Tax			
1. Build and pack crates for 60 mural panels and move to storage area. Transport panels to Sculpture Conservation Studios (SCS) for restoration. Repack and store finished panels.	\$37,300		\$37,300				Crates, progress report
2. Remove 60 panels from original wall, equipment rental, patching of old wall.	\$26,500		\$26,500				Removal of panels, patched wall, progress report
3. Conservation and restoration of 60 panels.							
Remove graffiti, repair major losses.	\$200,000	\$200,000					
Stabilize erosion, repair cracks, document all work, insurance, project management/supervision	\$226,900		\$226,900				
Repair rebar	\$45,000				\$45,000	\$45,000 (URCC)	Restored panels and rebar, periodic progress reports
4. Additional engineering services for design of wall required to meet Office of Historic Preservation standards	\$20,000		\$20,000				Engineering plans

5. Build new wall, remove trees and rete walkway, grade level, special testing and inspection permits.	\$200,000		\$200,000				Test results, permits, graded surface suitable for construction
Additional cost for poured-in-place concrete method required to meet OHP standards	\$75,000				\$75,000	\$75,000 (URCC)	New wall constructed in poured-in-place method
6. Re-hang 60 panels on new wall; apply anti-graffiti coating	\$40,000		\$40,000				Panels placed on new wall, anti-graffiti coating applied
7. Park landscaping	\$128,250		\$40,000	\$88,250			New landscaping
8. Lighting	\$86,250			\$86,250			Lighting for mural and park installed
Install seven interpretive panels	\$30,300		\$30,300				Panels
10. Design and install interpretive kiosk	\$40,000				\$40,000	\$40,000 (URCC)	Designs for kiosk, progress report
Public relations and education projects	\$95,500		\$95,500	\$95,500			Articles, flyers, newsletters, records of public events
Volunteer services (publicity, spokespersons, special events, community meetings) \$15/hr x \$45/mo x 30 months	\$20,250					\$20,250 (In-kind)	Volunteer sign-in sheets
<b>Totals</b>	<b>\$1,271,250</b>	<b>\$200,000</b>	<b>\$621,000</b>	<b>\$270,000</b>	<b>\$160,000</b>	<b>\$180,250</b>	

## **2. Match**

As illustrated in the chart above, the city will meet the 1:1 matching requirement with a combination of in-kind contributions from the community and funding from other grant programs that have not as yet been expended.

**In-Kind Contributions From the Community:** As the foregoing narratives have shown, the proposed project has generated truly exceptional support from the community. A small but quantifiable portion of this support will be used as in-kind match for CCHE funding. In-kind services for public relations and education projects relating to the mural will include volunteer services such as publicity services and spokespersons for special events and community meetings. The value for these activities (\$20,250) is calculated at \$15 per hour per volunteer x 45 hours per month x 30 months for the total restoration project.

**Unexpended Funds From Other Grant Programs:** The Urban Recreation and Cultural Center (URCC) Program awarded grant funds to the City of Inglewood toward the restoration of the mural. \$160,000 in unexpended URCC funds will be used as match for CCHE funding.

**Question Six - Project Team and Supporting Documents - Please provide information on each member of your Project Team.**

### **KEY CITY STAFF**

#### **Kevin Hawkins, Director of Parks, Recreation and Community Services – Project Director**

As the Project Director, Kevin Hawkins is responsible for the overall operation of the mural restoration project. He has been involved with the project since 2001. Mr. Hawkins brings a broad-based approach to municipal government and an educational background in Economics, Psychology and Emergency Management from the Santa Cruz and Berkeley campuses of the University of California. Following graduation and several years in the private sector, Mr. Hawkins joined the City of Inglewood Finance Department as a Budget Analyst in 1990. Mr. Hawkins soon moved to the Risk Management Division to head the City's Risk Management Program. In 1994, Mr. Hawkins was hired by the Inglewood Police Department to oversee the City's Emergency Services Program. In 1998, Mr. Hawkins was asked to join the Administrative Office as a City Council Liaison and Special Assistant to the City Administrator and played a role in the City's Community Beautification and Economic Development efforts.

In November of 2001, he was appointed as Director of the Department of Community Beautification Services. This Department earned an immediate reputation for excellent service delivery, innovation and efficiency. Community Beautification Services later merged with Parks and Recreation leading to his current position as Director of Parks, Recreation and Community Services. Throughout his tenure, programs under Mr. Hawkins' direction have been consistently recognized for increased productivity, innovation in government and quality service delivery.

For the proposed project, Mr. Hawkins leads a dedicated team of staff and contractor specialists to accomplish a very unique task of disassembling, restoring, and reconstructing the 240-foot long "History of Transportation" mural, while working closely with community groups, the artist's representative, and state and local agencies to assure the integrity of the mural's restoration and its placement in the new Art Park.

#### **Skip Halloran, Human Services Superintendent – Coordination of community resources for the preservation effort**

Skip Halloran has been the Human Services Superintendent for the City of Inglewood since 1994. In this capacity, she has been responsible for much of the planning and implementation of the city's Cultural Arts Master Plan, which was adopted in 1995. This responsibility included working with community groups and local artists to create new arts programs and develop neighborhood support for the arts. Artists in the community were a crucial impetus in the movement to preserve and restore "The History of Transportation" mural. Ms Halloran joined the City of Inglewood in 1981 as Supervisor of the Senior Citizen Center. She holds a Master's degree in Gerontology from the University of southern California.

### **COMMUNITY GROUPS AND SUPPORTERS**

#### **Historic Site Preservation Committee – Leaders of the community movement to save the mural**

The Historic Site Preservation Committee was founded in 1988 in order to save the mural. The approximately 40 community leaders, artists, educators, historians, and concerned citizens that make up its membership include members from the Historical Society of the Centinela Valley (see below), and have worked diligently for 16 years to see this project realized. The Committee has been intimately involved with the planning and implementation of the overall project.

### **Historical Society of the Centinela Valley – Community supporters**

With several hundred members, the Historical Society of the Centinela Valley is a major generator of community support for the project. The enthusiastic support of the Society has been pivotal in the success of the restoration effort since its beginning in 1988.

### **Tobey C. Moss – Artist's Representative and historical resource**

Tobey Moss, owner of the Tobey C. Moss Gallery in Los Angeles, was Helen Lundeberg's art dealer and representative. Tobey has been of invaluable assistance as a resource for historical information and as a supporter of the mural restoration since its inception. Tobey lectures to public and private groups on the aesthetics and techniques of printmaking and connoisseurship, lithography, California abstraction, and other topics.

#### **Professional Experience:**

1978-present: Tobey C. Moss Gallery

1977-78: Co-Director, Stephen White Gallery of Photography

1973-1977: Zeitlin & VerBrugge, Rare Books and Graphic Arts

1971-Present: Docent with the Los Angeles County Museum of Art

## **CONTRACTORS AND SPECIALISTS**

### **Sculpture Conservation Studio (SCS) - Mural Conservation and Restoration**

The Sculpture Conservation Studio, Inc. has been with the mural restoration project since 2001. SCS is a Los Angeles-based full service facility for the preservation and conservation of sculpture, architectural elements, artifacts, and decorative objects. Combining hands-on treatment with research and consulting services, the studio serves the needs of museums, architects, contractors, art dealers, public sector agencies, municipalities, and individual collectors of art objects. Projects have included items and/or architectural elements at the Frank Lloyd Wright Hollyhock House, the Pantages Theater in Hollywood, and the Banning Museum, and many others, including an assessment of eight of the California Missions underwritten by Mervyn's Department Stores. Key personnel at SCS include:

#### **Rosa Lowinger, Founder**

Rosa Lowinger established the Sculpture Conservation Studio in Los Angeles in 1994. She is a graduate of the Conservation Institute at New York University and a specialist in the conservation of architecture and sculpture. Considered one of the nation's leading restorers of twentieth century murals, she has been a private conservator for the past twenty years. Rosa has been the consulting conservator for the Watts Towers conservation project for the past 13 years. She has published widely on the conservation of contemporary art and architecture and she teaches internationally on the conservation of outdoor sculpture.

#### **Andrea Morse, Owner, Sculpture Conservation Studio**

SCS was founded in 1994 and Andrea became an owner/partner in 1997. She has a Bachelor of Arts in Art History and Fine Arts from UCLA. She was in the graduate program for interdisciplinary arts at San Francisco State University from 1972 to 1974. Her previous conservation experience was with the Los Angeles County Museum of Art, where a fellowship from the Kreiss Foundation allowed her to continue her studies. For several years prior to joining SCS she had a small private practice that specialized in objects.

Andrea started working on the "History of Transportation" project by carrying out the assessment of the mural's condition, which was funded by the Getty "Preserve Los Angeles" Grant. She worked with the City of Inglewood to obtain the historical designation for the mural and is the primary SCS contact on the mural.

Andrea provides direction in the issues related to the State Office of Historic Preservation. She is working closely with the City and the project manager in the design of the new park, and is involved in all aspects of redesigning the mounting for, and the instillation of, the panels once they are complete.

#### **Traci Lucero, Assistant Conservator**

Traci earned a Bachelor of Arts degree from Cal State Long Beach with a Major in Art History and Minor in Fine Art and Chemistry. She has been with the studio for one and a half years. She provides most of the scheduling and coordinates the work in the studio. She also assists Andrea and Rosa in researching methods and materials. Traci is the main studio contact for the day-to-day work on the mural. She is the person most "hands-on" with the project, doing graffiti removal and filling of minor losses.

#### **Catherine Hayes, Associate Conservator**

Catherine received her degree in the Conservation Techniques Program from Sir Sandford Fleming College in Peterborough, Ontario, Canada. She has been with SCS for one year. She provides input and consultation regarding the more complex treatment solutions being considered and attempted in the studio, and also provide some hands-on effort in moving the mural.

#### **Zuleyma Aguirre, Consultant**

Trained in conservation in Mexico by UNESCO, Zuleyma has a degree in Historic Preservation from the University of Mexico City. She has been the on-site conservator to the Watts Towers restoration project since 1987. The towers are not yet complete and she continues to work on them under a contract she has with the City of Los Angeles Cultural Affairs Department. For the mural project, she is advising SCS on the structural reinforcements that must be done for the mural and on areas where material has been lost. She works on the project when new panels come in to the studio.

#### **Melvyn Green and Associates, Inc. (MGA) – Construction of new wall for mural**

Melvyn Green and Associates, Inc have been selected to build the mural's new support wall with poured-in-place concrete. MGA is an award-winning structural engineering and historic preservation firm that provides evaluation, design and research services to governmental agencies and private building owners. MGA strives to maintain the integrity of each project by using a technical and scientific engineering approach balanced with sensitivity toward a project's original architectural design intentions. Recently awarded the Governor's Preservation Award for UCLA's Powell Library (1996) and Royce Hall, UCLA (1998-1999), MGA has an ever-present concern for the maintenance and upgrading of quality standards that has led them to be researchers for both federal and regional agencies.

**Melvyn Green** graduated with a BS in Civil Engineering from the University of Arizona in 1960. He went on to do his postgraduate work at UCLA, Loyola University, and USC. His project experience for historic preservation and materials conservation includes: Greystone Mansion for the City of Beverly Hills; Royce Hall at UCLA; Powell Library, UCLA; and the Presidio Trust and Golden Gate Bridge in San Francisco. In addition, Mr. Green has done seismic strengthening and historic preservation for the San Gabriel Mission in California and the U.S. Mint Building in Carson City, Nevada.

#### **Lane and Lane, Inc. – Design of the mural's interpretive kiosk**

Founded in 1996, Lane and Lane has successfully created many environmental communications systems in Southern California that include Dodger Stadium, Los Angeles Union Station, and Westside Children's Center. Recently, Lane and Lane was asked to join in the creation of numerous historic stanchions dedicated to the

identification, commemoration, and celebration of historically significant sites throughout Los Angeles. Brian and Tracey Lane, two of the principal members of the design team, are members of the California Preservation Foundation. Lane and Lane joined the project in 2002.

**Elwood & Associates (E&A) –Consultant on Public Art Issues**

**Lesley A. Elwood** formed Elwood & Associates in 1993 to assist developers, architects, and cities in cultural planning to satisfy their arts development fee or public art requirement. Lesley A. Elwood is the sole owner of E&A. She began her career in fine arts in 1986 working for two well-known Los Angeles based contemporary galleries. Curating exhibitions in community art centers and alternative venues complemented private sector experience. In 1991 Ms. Elwood began working for the City of Los Angeles Cultural Affairs Department Public Arts Program. Under the direction of department supervisor, Barbara Goldstein, Ms. Elwood began working on a program to train artists and art consultants in the policy and procedures of the City of Los Angeles Percent-for-Art Requirement. In cooperation with other departmental staff Ms. Elwood organized and conducted “workshops” which addressed criteria for program or project requirements, artist presentations, artist contracts, public art maintenance, artists rights and process established for departmental approval at various stages of artist commission. Since 1993 E&A has been contracted with numerous public institutions and private developers. These include the City of Los Angeles Community Redevelopment Agency, City of Santa Fe Springs, City of Los Angeles Cultural Affairs Department, Los Angeles to Pasadena Metro Blue Line Construction Authority, County of Los Angeles Community Development Commission and national public retail chains such as Pep Boys Inc. These projects have all required intensive community interaction, governmental agency coordination, and artist oversight.

Ms. Elwood has worked with artists from all over the United States as well as Mexico, Japan, and Argentina. She has coordinated public art educational tours for Los Angeles City College, the City of Santa Fe Springs and the National Gallery of Art-Palais de Glace in Buenos Aires, Argentina.

**Education**

University of Southern California - Bachelor of Arts in Art History

**Professional Associations**

Association for Women in Architecture - AWA

Public Art Coalition, Southern California - PAC SoCal

**Awards**

City of Los Angeles -Echo Park TNI Project

AIA LA - Project of the Year - Metro Gold Line Construction Authority

**Portia Lee (California Archives)– Project Archivist**

Portia Lee, Ph.D., is the principal in California Archives, a sole proprietorship. She will be recording all aspects of the project. She received her Ph.D. in American Cultural History with a specialization in American Architectural History and Landscape. She is Registered Professional Historian #547, qualified by the California Council for the Promotion of History. She has performed a variety of historic preservation projects for such entities as the Los Angeles Metropolitan Transit Authority, the California Department of Transportation, and the City of Los Angeles Bureau of Engineering.

**Young Communications Group – Public relations for mural project**

Young Communications Group has played a key part in promoting the mural restoration effort and keeping the public informed of its progress since 2003. Formed in 1991, the company specializes in media relations, community and government relations, and public/private partnership development.

**Michael Several – *Writer for interpretive information panels to be placed near mural***

**Professional Experience:**

1990 - Present: Independent Contractor – Writer/Historian

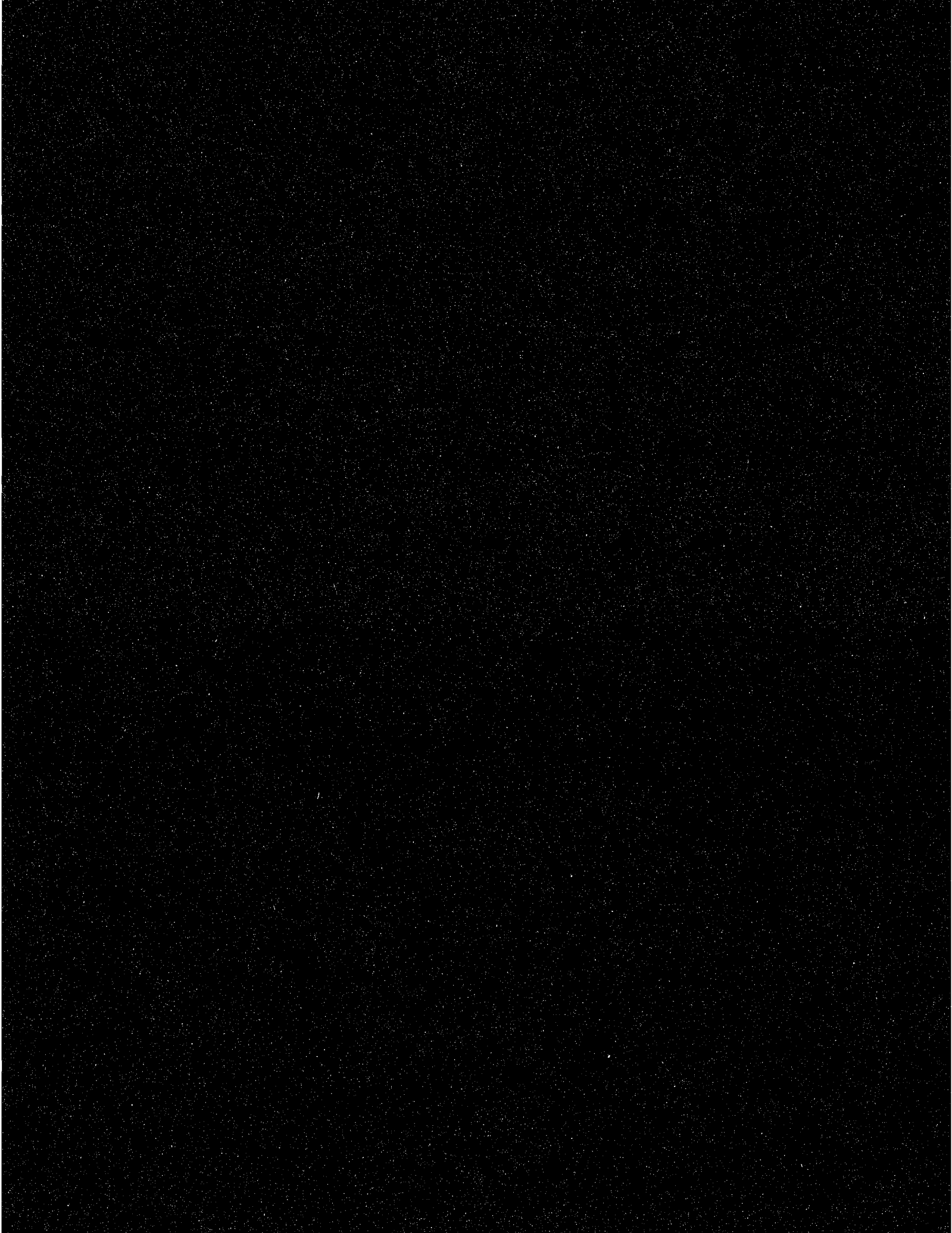
- Researched and wrote content for a public art web site maintained at the University of Southern California ([www.usc.edu/isd/archives/la/pubart](http://www.usc.edu/isd/archives/la/pubart)).
- Researched public art in Los Angeles and wrote three guide books and two brochures giving the history and the physical and cultural context of sculpture and murals.
- Researched history of murals for conservation project funded by the City of Los Angeles.

Education: B. A., Political Science, University of California, Berkeley

**Publications:**

- *Palestine Exploration Quarterly*, "Reconsidering the Egyptian Empire in Palestine During the Amarna Period," 1971.
- *Levant*, "An Early Bronze Age Basalt Bowl in the Skirball Museum," Vol. VII, 1975.
- *KCET Magazine*, "Open Air Gallery," March, 1989;
- *Footnotes*, "The Public Art in Pershing Square," Los Angeles Conservancy, February, March and April, 1988;
- *Conservancy*, "Remembering the New Deal: Two Westside Murals," Nov/Dec. 1989;
- *Newsletter of Mural Conservancy*, "Fair Lady, Never Seen," Fall, 1988;
- *Public Art Review*, "Reclaiming a City's History: Biddy Mason's Place," Fall/Winter 1990;
- -----, "Plaza Suite," Fall/Winter 1991;
- -----, "P.A.R.T.I. Public Art: Realities, Theories & Issues," Spring/Summer, 1995;
- -----, "Photographic Memories: Miyatake at Manzanar," Spring/Summer, 1996;
- *Los Angeles Arts Passport, Public Art: Free and Easy*, p. 30, California Trade and Commerce Agency, Office of Tourism and California Arts Council, 1993;
- *Public Art of Los Angeles, Pt. I: El Pueblo de Los Angeles Historic Monument and Adjacent Freeway Murals*, 1991;
- *Public Art of Los Angeles, Pt. II: Little Tokyo*, 1994;
- *Public Art of Los Angeles, Pt. III: Civic Center*, 1997;
- Wrote 170 histories and artist biographies for a web-site on public art maintained at the Doheny Library of the University of Southern California ([www.usc.edu/isd/archives/la/pubart](http://www.usc.edu/isd/archives/la/pubart)).







## California Cultural and Historical Endowment Grant Application Face Sheet

Applicant Name:  
(Organization or Public Agency) Autry National Center of the American West

Applicant Address: Autry National Center  
4700 Western Heritage Way  
Los Angeles, CA 90027-1462

Public Contact  
Regarding this Project: David Burton, Associate Director, Gov't Affairs

Public Contact Telephone: (323) 667-2000, ext. 378  
Facsimile: (323) 660-5721  
Email: dburton@autrynationalcenter.org

Non-profit Organization Federal  
Employer Identification Number: 95-3947744

---

Name of Project:  
(Short Title) Saving the Southwest Museum of the American Indian

Project Amount:  
(Total Amount of Project) \$117,985,000

Amount you are Requesting from  
CCHE: \$5,000,000

Project Location:  
(indicate exact address,  
City and County) 234 Museum Drive, Los Angeles, Los Angeles  
4700 Western Heritage Way, Los Angeles, Los Angeles

Anticipated Project Start Date: March 2003  
(if you have already initiated your project, indicate that date)

Anticipated Completion Date: December 2008

Location Latitude and Longitude: Museum Drive: 34° 5' 57" / -118° 12' 22"  
Western Heritage Way: 34° 8' 54" / -118° 16' 55"

Website Address (if applicable) www.autrynationalcenter.org

**Part One-CCHE Face Sheet**

**Brief Project Description:(please use the space provided below)**

Founded in 1907, the Southwest Museum of the American Indian is the oldest museum in Los Angeles. It possesses what is arguably the world's second most important collection of Native American material, as well as a significant collection of art and artifacts related to California's early history. The building in which it is housed dates to 1914 and is listed in the California Register of Historical Resources and just recently in the National Register of Historic Places.

In March 2003, the Southwest Museum merged with the Museum of the American West (formerly the Autry Museum of Western Heritage) to establish the Autry National Center. Prior to the merger, the Southwest Museum was severely limited in its ability to properly care for its collection. Overcrowded storage facilities, lack of sufficient climate controls, and pest infestation were threatening an abundance of material culture possessing enormous educational value. Furthermore, public access was inadequate due to the museum's location, aging structures, and lack of funding for public programs, exhibitions, and visitor services. With a small staff and scant financial resources, the Southwest Museum was able to maintain a schedule of exhibitions and educational outreach programs, but not at a level befitting its important collection. Long-term protection of art and artifacts has been a grave concern.

To ensure the vitality of the Southwest Museum for future generations, the Autry National Center has organized its resources and established four goals that will be accomplished by 2008.

1. Preserve the collection through implementation of a multi-year conservation plan.
2. Create a new building for the Southwest Museum to guarantee proper long-term storage of the collection and to expand public access through exhibitions and other educational programs.
3. Initiate rehabilitation of historic Southwest Museum structures so that the Autry can actively maintain programming at this important site.
4. Create a long-term plan for the historic Southwest Museum building that is consistent with its origins, sensitive to the needs and concerns of the surrounding community, and that is economically viable for decades to come.

CCHE funding is crucial to the successful completion of the first, second, and third goals. It would provide important resources at a transformative moment and would assist greatly in leveraging funding commitments from key individuals, foundations, and corporations.

**CCHE Use Only:**

Department Reference No.:

Bond:

Budget Year:

Award Date:

Type of Award:

Project Type:

_____
_____
_____
_____
_____

## Part One -- Checklist and Acknowledgement Form

### Page One of Two

#### Checklist and Acknowledgment Form

**NOTE: A SIGNED COPY OF THIS FORM MUST BE INCLUDED WITH YOUR CCHE GRANT APPLICATION. AFTER YOU HAVE DETERMINED THAT YOU HAVE INCLUDED ALL OF THE INFORMATION LISTED ON THIS CHECKLIST, PLEASE DOUBLE CHECK THE INFORMATION BY INITIALING AFTER EACH ITEM REQUESTED, SIGN AND DATE IT.**

Item

Initial

#### PART ONE OF CCHE GRANT APPLICATION CONSISTING OF:

- |    |   |          |
|----|---|----------|
| 1. | CCHE Face Sheet (2 pages)                   | <u>✓</u> |
| 2. | Checklist and Acknowledgment Form (2 pages) | <u>✓</u> |

#### PART TWO OF CCHE GRANT APPLICATION CONSISTING OF:

Answers to Questions One-Six  
(each question must follow page/space allocation)

- |             |  |          |
|-------------|--|----------|
| Question 1: | Project Description and Project Goals        | <u>✓</u> |
| Question 2: | Project Audience and Needs Assessment        | <u>✓</u> |
| Question 3: | CCHE Priorities                              | <u>✓</u> |
| Question 4: | Project Maintenance and Public Accessibility | <u>✓</u> |
| Question 5: | Tasks, Budget and Matching Requirement       | <u>✓</u> |
| Question 6: | Project Team and Supporting Documents        | <u>✓</u> |

#### PART THREE OF CCHE GRANT APPLICATION CONSISTING OF:

##### Attachments to the CCHE Grant Application

- |               |   |          |
|---------------|---|----------|
| Attachment 1: | Visual Description of Proposed Project                              | <u>✓</u> |
| Attachment 2: | IRS Determination Letter*   | <u>✓</u> |
| Attachment 3: | Non-Profit Organization by-laws*                                    | <u>✓</u> |
| Attachment 4: | Non-Profit Organization Articles of Incorporation*                  | <u>✓</u> |
| Attachment 5: | IRS Form 990 or 990EZ or 1023*                                      | <u>✓</u> |
| Attachment 6: | Non-Profit Organization's Board of Directors, staff and volunteers* | <u>✓</u> |
| Attachment 7: | Copy of Resolution  | <u>✓</u> |

(\*non-profit organizations only)

## Part One-Checklist and Acknowledgement Form

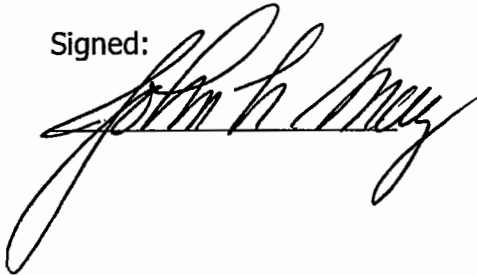
### Acknowledgement

The CCHE grant applicant signing below declares the following:

The applicant understands that by submitting this CCHE Grant Application, that he/she is indicating that the information submitted therein is true and accurate to the best of their ability and that the applicant waives any and all rights to privacy and confidentiality of the material submitted.

The applicant also understands that if any part of the information in the CCHE Grant Application is found incorrect, inaccurate or if there is a change in the information provided in the CCHE Grant Application after it is submitted, that this information will be made known to CCHE in writing as soon as possible.

Signed:



Date:

9-30-04

Print Name: John L. Gray

Title: President & CEO, Autry National Center

## Question 1: Project Description & Goals

In March 2003, the Southwest Museum of the American Indian and the Museum of the American West (formerly the Autry Museum of Western Heritage) merged to establish the Autry National Center. The merger has brought together two museums that have long devoted their talents and resources to uncovering, preserving, and interpreting the complex history of California and the western United States. The partnership is strengthening the work of both institutions and is strategically advancing their complementary missions and goals. Under the umbrella of the Autry National Center, the two museums have preserved their distinct identities, maintaining separate curatorial staffs as well as their own programming agendas and budgets.

Founded in 1907, the Southwest Museum is the oldest museum in Los Angeles. It possesses what is arguably the world's second most important collection of Native American material, as well as a significant collection of art and artifacts related to California's early history. Located on a 12-acre campus in the Mount Washington neighborhood of Los Angeles, the Southwest Museum building is recognized as an historically significant landmark. Designed by the architectural firm of Sumner Hunt and Silas Burns, it has been designated a City of Los Angeles Historic-Cultural Monument, and is listed in the California Register of Historical Resources and just recently in the National Register of Historic Places. The Southwest Museum also includes the Casa de Adobe, a 1918 replica of an historic California rancho. Over the years, the Casa has been used to illustrate life in California in the early 19<sup>th</sup> century.

The Southwest Museum has enormous potential as a resource for telling the stories of California's and the nation's indigenous peoples, as well as for interpreting the state's Spanish and Mexican roots. Tragically, the museum's location, aging and inadequate structures, and lack of funding for public programs, exhibitions, and visitor services have severely limited its ability to serve the public and fulfill its educational mission. The current condition of its building does not conform to acceptable museum standards, presenting a grave danger to the long-term safety of its collections. Overcrowded storage facilities, pest infestation, lack of both sufficient climate controls and fire protections threaten historically irreplaceable material possessing enormous educational value. Due to damage from the Northridge earthquake, the Casa de Adobe has been closed for public educational purposes since 1994.

To ensure the vitality of the Southwest Museum for future generations, the Autry National Center has organized its resources and established four goals that will be accomplished by 2008. CCHE funding is crucial to the successful completion of the first, second, and third goals.

1. Preserve the collection. This will be done by removing art and artifacts from the inappropriate conditions in which they are currently stored, by conducting comprehensive conservation treatments, and by rehousing material according to accepted museum standards.
2. Create a new building for the Southwest Museum next to the Museum of the American West at the Autry's Griffith Park campus. The new building will include 30,000 square feet of open storage that surpasses contemporary museum standards and that assures protection of the Southwest's important collections for posterity. Along with open storage, 25,000 square feet of new exhibition galleries will allow for greater public access to the collections than is currently available at the Mount Washington site. In its current location, the Southwest Museum averages 38,000 visitors annually. The new building in Griffith Park will raise visitation to over 350,000 per year, similar to the Museum of the American West.

3. Initiate rehabilitation of the historic structures at the Mount Washington campus, including improvements to the main Southwest Museum building and the Casa de Adobe. This work will allow the Southwest Museum to maintain public activity while the new building at Griffith Park is constructed and while a determination is made regarding the best long-term use of the Mount Washington site. Immediate upgrades to electrical, mechanical, and plumbing systems are essential to providing flexibility for any potential future use (i.e., rotating exhibits, educational outreach to schools, public programs, community events.)
4. Create a long-term plan for use of the historic Southwest Museum building and the Casa de Adobe. The Autry National Center will conduct a series of public planning sessions through early 2005 involving community groups from around the Mount Washington area. The process will focus on a vision of the Southwest Museum that is consistent with its origins, sensitive to the needs and concerns of the surrounding community, and that provides an economically viable future for the site. The results of this plan will help determine how best to complete the restoration of the structures at the Mount Washington campus.

In its nearly 100-year existence, the Southwest Museum has built a collection of Native American material culture unparalleled in size and depth by any nongovernmental institution in the world. The majority of its 225,000 ethnographic and archaeological artifacts exemplify the history and cultures of indigenous peoples from California and the American Southwest, and also from areas such as the Great Plains, the Colorado Plateau, the Great Basin, the Columbia River, and the Pacific Northwest Coast. Twenty-eight California tribes, spanning the state, are represented. The collection includes both historically significant artifacts and an abundance of resource types that help to illustrate the development, evolution, and enduring vitality of Native American cultures in California and the United States. A number of prominent American museum officials — including Rick West, founding director of the Smithsonian's National Museum of the American Indian — have made public statements about the importance of the Southwest Museum's collection. Of the five largest Native American collections in the United States, the Southwest Museum's is the only one located west of the Mississippi River.

The Southwest Museum collection also includes material from before California was admitted to the United States, representing the state's Spanish colonial and Mexican past. Most of these objects have never been exhibited for the public. Located a block below the main museum building, the Casa de Adobe is a replica of Rancho Guajome, a pre-1850s Spanish California ranch house. It was built in 1918 by the Hispanic Society of California and donated to the Southwest Museum in 1925. Regarded as one of Southern California's earliest examples of the popular Mission Revival style of architecture, the Casa was used as a living history museum — depicting daily life in Southern California between 1821 and 1849, the period of Mexican rule — prior to the Northridge earthquake. Related museum holdings include furniture, paintings, decorative arts, tin work, and religious folk art of the period.

The Southwest Museum has operated in its present building since 1914. The Mount Washington neighborhood in which it is located is only a few miles from downtown Los Angeles and nine miles from the Autry's Griffith Park campus, which currently houses the Museum of the American West and the Autry National Center's administrative offices. The communities surrounding the Southwest Museum — including Mount Washington, Highland Park, and the breadth of the Arroyo Seco, which connects downtown Los Angeles with Pasadena — are generally underserved and deeply value the museum as their major cultural resource.

## Question 2: Audience & Needs Assessment

The Autry National Center's mission is to make history — specifically, the history of the diverse peoples of California and the American West — alive and relevant to contemporary audiences so that they may better understand the world they live in and make informed decisions in the building of a shared future. The Center has been organized around three complementary and cooperative entities:

- The Southwest Museum of the American Indian, specializing in Native American histories and cultures to advance the knowledge, understanding, and appreciation of diverse indigenous peoples.
- The Museum of the American West, focusing on the interwoven histories, cultures, and mythologies of the American West and all its diverse peoples.
- The Institute for the Study of the American West, which stimulates the production of original and relevant scholarship to inform exhibitions, programs, and publications of the Southwest Museum and the Museum of the American West, as well as to advance the field of Western history.

The Autry National Center's audience encompasses people from Southern California, the United States, and the world. Approximately 30% of the Center's visitors live outside the metropolitan Los Angeles area, with roughly 20% residing in other states or foreign countries. In 2003, the Center welcomed visitors from 38 different states (24 east of the Mississippi River) and 29 countries (predominantly from Europe and Asia). Annual visitation exceeds 370,000.

Los Angeles County is incredibly diverse. Over 44% of its population is identified as Hispanic or Latino, 31% as White, 12% Asian or Pacific Islander, and 10% African American or Black. The county is also home to over 100,000 Native Americans, representing over 100 different tribes. This is the largest urban concentration of intertribal American Indians in the United States. Because of the area's makeup and history, the Autry National Center presents exhibitions and educational opportunities that speak to and serve a broad and diverse constituency, and that reflect and include many of the region's cultural and ethnic communities.

Education is at the core of the Autry National Center's mission. The institution's education division conducts classes and workshops for children, adults, and families, as well as professional development symposia for K-12 teachers. Outreach programs include *Community Stories Outreach Kits*, highlighting the experiences of eight culturally-diverse families with deep roots in the American West. The education division also presents scholarly lectures and symposia, artist demonstrations, films, theatrical performances, and concerts, and is responsible for the training and supervision of the museum's 250 volunteer docents and 17 junior docents. Each year over 90,000 K-12 students are served through free, docent-guided tours of the two museums and through the Museum of the American West's Family Discovery Gallery. This includes over 15,000 students served through the Center's *All Aboard!* program, which provides free bus transportation for classes in Title I schools, complimentary Autry National Center family memberships for participating students, and special curriculum development opportunities for their teachers.

The Autry National Center's ability to expand and serve its student and adult visitors, as well as researchers and scholars, will be greatly compromised unless the historic Native American and Hispanic collections of the Southwest Museum are conserved, protected, and made easily accessible. A comprehensive conservation assessment of the Southwest Museum facility at Mount Washington



was conducted in 2003 by Linda Strauss, the Autry National Center's senior director of collections and chief conservator. It revealed the following: 1) woefully inadequate storage conditions characterized by an insufficiency or total absence of climate controls, severe overcrowding, and improper placement of material on shelves; 2) the existence in storage areas of moisture seepage through ceilings, walls, and floors; 3) housing of sensitive materials in acidic boxes; 4) insufficient protection against dust and particulate matter; 5) absence of effective security. The assessment also uncovered deteriorating artifacts distressed from insect infestation, presence of active mold, and severe accumulation of dirt and grime. In addition, many items were found to suffer from reparable tears, cracks, and breakages.

The threat to the Southwest collection is immediate and grave. Consequently, the Autry National Center has established as its highest priority the conservation and long-term protection of this collection. Under the leadership of Ms. Strauss, a multi-faceted plan has been created for the movement, preservation, and environmental protection of Southwest artifacts. This plan also addresses essential systems upgrades that will enhance cataloguing and data management and establishes, for the first time, security systems and protocols. Experienced collections management, conservation, and security professionals on the Autry staff are overseeing implementation of the conservation plan.

The conservation plan for the Southwest collection encompasses three major phases occurring over a 48-month period. It allows for the holistic care of all materials in the Southwest collection, as well as in-depth treatments of the most vulnerable objects. Phase 1, which will be completed by October 2004, focuses on the establishment of essential infrastructure. This includes the purchase of new computer equipment, upgrading of collections management software and subsequent data clean-up, installation of a modern security system and institution of security protocols, the reconfiguration of specific exhibit galleries to create a temporary on-site conservation lab and temporary storage facilities that adhere to museum standards. Funding for Phase 1 has been secured and is not part of this request.

Phase 2 focuses on the movement, treatment, and rehousing of the most vulnerable artifacts in the Southwest collection — roughly 25,000 ethnographic objects. This phase will be implemented over a 24-month period from November 2004 to October 2006. Phase 3 focuses on the treatment and rehousing of important materials considered to be less vulnerable but also in need of proper care; it will be completed by October 2007. Of the Autry's total CCHE grant request, \$1.5 million would be directed to Phases 2 and 3, guaranteeing the timely completion of critical conservation efforts.

Due to their age, the Southwest Museum building and the Casa de Adobe require extensive rehabilitation and reconfiguration. Because they are culturally and historically important to the identity of Los Angeles, they will be restored by the Autry National Center over the next five years. However, given their location in a residential neighborhood and the inherent limitations of the buildings, it is highly unlikely that the current Southwest Museum facilities will ever allow for adequate long-term storage of the collection or the creation of broad public access. Therefore, the directors of the Autry National Center have determined that the greatest public benefit for the Southwest collection will occur by building new facilities for long-term storage and exhibition at the Center's Griffith Park site. This facility will open in 2008.

Because the Southwest Museum is the major cultural resource of the Mount Washington neighborhood and surrounding communities, the Autry will actively maintain Southwest Museum programming at the historic site. Exhibits and education outreach will continue there while the Center works with community groups to determine long-term uses that satisfy and exceed both the needs and desires of area residents.

### Question 3: CCHE Priorities

Saving the Southwest Museum collection and creating a new facility both to house and exhibit it directly addresses key priorities of the California Cultural and Historical Endowment. Through these efforts, the Autry will preserve, interpret, and enhance public understanding of Native American history and culture. The Southwest collection not only serves as a tool for appreciating California and the West's Native past, it is a valuable link to contemporary indigenous peoples, providing a resource by which present day American Indians can share with a broad public their stories and perceptions.

While Native American material dominates the Southwest's collections, one must not forget the importance of the museum's early California holdings nor the historical significance of its landmark building. Preserving the Southwest Museum's Spanish and Mexican materials and restoring the Casa de Adobe will allow the Autry to interpret more completely and effectively an often neglected aspect of the California story, while at the same time engaging new audiences from the state's Latino communities. Rehabilitating the historic building at Mount Washington and determining appropriate long-term uses for it will ensure that culturally underserved residents in the surrounding neighborhoods and all along the Arroyo Seco do not lose a precious resource intimately tied to their local identity and to the history of 20<sup>th</sup> century Los Angeles.

The Autry National Center will save the Southwest Museum collection and energize its public education mission with the widespread involvement of Native Americans from California and the rest of the nation. Through a major initiative known as *Voices of Native America*, the Autry National Center is creating new opportunities for indigenous peoples to participate fully in the care of the Southwest Museum collection and also in determining how it is used to interpret the American Indian experience. Components of this initiative include:

- A Native American Stewardship Council, formed early in 2004. The Council is helping to guide programming related to indigenous peoples and is making recommendations on how the Center can best serve American Indian communities. It is led by Maurice Lyons, chairman, Morongo Band of Mission Indians; Richard Milanovich, chairman, tribal council, Agua Caliente Band of Cahuilla Indians; Chad Smith, principal chief of the Cherokee nation; N. Scott Momaday, Pulitzer prize-winning author, scholar, and founder of the Buffalo Trust; Rick West, founding director of the National Museum of the American Indian; and Jeanne Givens, board chair, Institute of American Indian Arts in Santa Fe. The Stewardship Council has already met twice and will meet again in November 2004.
- Creation of new positions at the Southwest Museum to be staffed by professionals of Native American heritage. These include a senior curator, a junior curator, and a recently hired associate conservator. Prior to the merger, the Southwest Museum was operating with only three part-time curators and never had a full-time conservation professional on its staff.
- Development and implementation of exhibitions, symposia, and performing arts focused on the neglected histories and experiences of California's and the West's indigenous peoples. Exhibitions, public programs, and education outreach will occur at both the Griffith Park and Mount Washington campuses, as well as in Native American communities in California and nationally. In November 2003, the Autry signed a Memorandum of Understanding with the newly opened National Museum of the American Indian in Washington, D.C. that will facilitate exhibition and program collaborations between the two institutions in the coming years.

- Establishment of fellowships for American Indians pursuing careers in museums.
- Creation and distribution of K-12 curricula focused on the history and experience of Native American communities.
- Growth of *Native Voices at the Autry*, an ongoing theater initiative launched in 2000. This program develops new works for the stage by indigenous peoples; advances the overall professionalization of Native American writers, actors, and theater artists; and mentors Native American youth in the art of playwriting. Thirteen plays have been developed in the past four years, including four world premiere productions. Recently, *Native Voices at the Autry* issued its first play commission. In this new work, award-winning playwright Marie Humber Clements of the Metis First Nation will explore issues inspired by the collections of the Southwest Museum. The play will be developed over the next two years, with an eye towards a world premiere at the Autry National Center in 2006. Meanwhile, a successful youth outreach component, done for the past three years in collaboration with the Southern California Indian Center (Los Angeles County), will be implemented at the Coeur d'Alene nation in Idaho in fall 2005 thanks in large part to one of the Center's Native stewards, Jeanne Givens, who is a member of that nation.

The Southwest's collection of Native American material is widely regarded as second only to the holdings of the Smithsonian's National Museum of the American Indian in Washington. Navajo and Pueblo textiles exceed in number the combined collections of the National Museum of the American Indian and the National Museum of Natural History. Its over 13,400 baskets constitute the largest collection of Native American baskets in the world. Additionally, the overall collection contains more than 11,000 ceramic pieces, including 2,200 historic Pueblo and 2,000 prehistoric Southwest ceramics; 3,000 sound recordings, including 990 wax cylinders dating from 1895 of the Maidu, Cheyenne, Arapaho, and Santa Domingo tribes. Over 25,000 ethnographic artifacts, and 185,000 archaeological items encompass the indigenous cultures of California and the entire American West and represent 11,000 years of continuous habitation in the state and region. Because of inadequate space and limited funding, most of these materials have never been exhibited to the public.

Twenty-eight California tribes are represented in the collection. They include the Cahuilla, Chemehuevi, Chumash, Gabrieliño, Hoopa, Karok, Maidu, Miwok, Mono, Pauite, Pomo, Serrano, Yokuts, Yurok. Roughly 3,000 objects are attributed to Northern California tribes, 4,000 to tribes from the central part of the state, and 4,000 from Southern California. Today, a number of these nations are building or are planning to build tribal museums and are looking to the Southwest Museum collections as a principal resource for exhibition and program development, as well as loans.

The collection is enhanced by archival materials housed in the Southwest Museum's Braun Research Library — now a part of the Institute for the Study of the American West. Comprised of 55,000 bound volumes and serial publications, 150,000 historic photographs, numerous anthropological papers, manuscripts, and sound recordings, the Braun materials help document hundreds of years of Native American culture as well as much of the museum's ethnographic and archaeological items.

Art and artifacts from California's Spanish colonial and Mexican past represent diverse threads in the state's rich multi-cultural story and also provide links to Southern California's burgeoning Latino population. Some of these items can be seen in a current bilingual show at the Museum of the American West — *El Norte: The Spanish and Mexican North* — and will be featured in future exhibitions such as *Vaquero: The Reality and Romance of the California Cowboy* (2009).

## Question 4: Project Maintenance & Public Accessibility

### Project Maintenance

The creation of the Autry National Center has provided a tremendous opportunity to plan a future for the Southwest Museum that will fulfill its mission, protect the integrity of its collections, serve the general public with innovative exhibits and educational programs, and greatly benefit the state's and the nation's Native American and Latino communities. Now, with access to the combined human and financial resources of the Autry National Center, the horizons for future public programs that advance the humanities and that elevate Native American and Mexican American heritage have been expanded enormously. For the first time in its 100-year history the Southwest Museum is supported by a full range of museum professionals including full-time conservators, collections managers, development officers, marketing and public relations staff.

Overseeing the effort to conserve and protect the Southwest Museum collections is Linda Strauss, the Autry National Center's senior director for collections and chief conservator. Ms. Strauss has 20 years of experience in the conservation field. To supervise day to day activity, the Autry has engaged Lisa Forman, a conservator experienced with large-scale conservation and rehousing projects. Ms. Forman has assembled a professional team that includes an object conservator, a registrar, and four artifact handlers. Further assistance is being provided by full-time Autry collections and conservation staff, including Angela McGrew, whose work focuses exclusively on the Southwest Museum's Native American material. Prior to Ms. McGrew's hiring, the Southwest Museum collection had never been cared for by a full-time professional conservator.

The renowned preservation architectural firm of Levin & Associates conducted an historic structures assessment that examined the history and condition of the Southwest Museum's current facilities at the Mount Washington campus. The firm's completed rehabilitation study details the history of the building, its structural capacity, and its potential for continued use as a traditional museum. Contributing to the study was the international consulting firm Economic Resource Associates, which provided expertise on the economic feasibility of maintaining a full-service museum at the Mount Washington site. The report lays the groundwork for a thoughtful assessment of the best long-term uses for the historic Southwest Museum building. The Autry is currently discussing management of the initial rehabilitation efforts with Levin & Associates, which would be completed in 2005.

Community and neighborhood groups from the Mount Washington and Arroyo Seco areas have been and continue to be fully involved in best use discussions. The Autry has engaged Fred Glick of Huitt-Zollars, Inc. to lead a series of public planning meetings over the next four months to help the Autry in making final determinations. Representatives from the local community and elected public officials, including Los Angeles city council members Ed Reyes and Antonio Villaraigosa, will participate. Mr. Glick is intimately familiar with the Mount Washington neighborhood and surrounding communities, having worked for a number of years on transportation and linkages issues related to the new Gold Line, which runs from downtown Los Angeles to Pasadena.

In addition to a new Southwest Museum building, the Autry will construct a new facility for its Institute (including expanded facilities for its K-12 and family education programs) and a new visitor services and orientation pavilion at the Griffith Park campus. The Center anticipates breaking ground for all three buildings early in 2006 and opening them to the public by summer 2008. Gloria Gerace, an expert in architectural programming, has been engaged to facilitate the architect selection process.

The deadline for submitting RFQs is October 4, 2004. Three finalists will make presentations to the Autry board in February 2005, and a final selection will be made on March 1, 2005.

Prior to the merger, the Southwest Museum had a difficult time raising contributed revenues for its operations and programming. Now, as part of the Autry National Center, the Southwest Museum is once again generating interest and support among funding agencies and individual benefactors. It is now possible to plan for the long term with a high degree of certainty about funding support in the future. In addition to the conservation effort and the construction and rehabilitation projects, the Center's strategic plan calls for the enhancement of existing endowments, as well as the creation of new endowments, to support interpretive work and collections care. For its capital and endowment needs, the Center will have full financial participation of its 13 directors and 78 trustees, and has already received \$45 million in commitments.

In 2003, the Autry National Center was awarded over \$1.5 million from Los Angeles foundations to initiate its multi-year conservation plan for the Southwest collection. Awards were made by the Ahmanson Foundation, the Getty Grant Program, the W.M. Keck Foundation, and the Weingart Foundation. Continuing discussions with these organizations — as well as with the James Irvine Foundation, the Ralph M. Parsons Foundation, The Rose Hills Foundation, and others — suggest that significant grants may be forthcoming to support capital and endowment projects. A grant from CCHE would provide critical funding as well as enormous leverage in securing new foundation commitments.

The Center has a full staff of senior development professionals, each focusing on specific areas such as major gifts, corporate relations, foundation relations, and government affairs. Working with development staff is the consulting firm of Marts & Lundy, which has been engaged to help develop and implement a comprehensive campaign that will support capital projects, endowment, and long-range strategic programming. The feasibility phase has been completed. A target goal of \$150 million has been established and the silent phase of the campaign has been initiated. Roughly half the target goal is for bricks and mortar (the new Southwest Museum building, as well as new Institute and visitor services facilities). The other half will be directed to specified endowments. The Center anticipates commencing the public phase of the campaign by January 2006, once half the goal has been secured.

Long-term strategic planning also includes building the Center's membership. Following the merger, total membership of the Autry National Center grew to 6,100, the vast majority residing in Southern California. The Center's goal is to broaden its national base and increase total membership to 20,000. Building membership is a fundamental element to implementing a successful comprehensive fundraising campaign, as well as expanding audience.

Rehabilitation of the Southwest Museum building and the Casa de Adobe at the Mount Washington campus will be conducted under the aegis of the City of Los Angeles Planning Department. Because the museum building is listed on the National Register of Historic Places, improvements will comply with the Secretary of the Interior's standards for rehabilitation, and thus will have no significant impact on the historic building. Either a Categorical Exemption or a Mitigated Negative Declaration is anticipated to be the appropriate level of CEQA compliance for contemplated improvements.

For new construction at the Griffith Park campus, the Autry National Center will conduct appropriate CEQA compliance under the aegis of the City of Los Angeles, the owner of the land, and its agencies (City of Los Angeles Department of Recreation and Parks and City of Los Angeles Planning Department), and with relevant state agencies as needed.



### Public Accessibility

Providing physical access to facilities, as well as creating broad public access to collections and programs, are high priorities of the Autry National Center. For the Southwest Museum, physical accessibility at Mount Washington is a major concern. School buses are unable to navigate the steep road that leads to the museum entrance. Students debark at the base of a hill and must be shepherded through a long tunnel and up an elevator into the museum, a cumbersome process. In addition, the size of the galleries severely limits the number of school tours that can be accommodated in a day. A new building at Griffith Park will have no such problems. It will provide a proper staging area and abundant gallery space for multiple school tours, increasing outreach to students. The historic Southwest Museum building and the Casa de Adobe are currently not handicapped accessible. In rehabilitating these facilities, the Autry will create full access to visitors with physical challenges.

Despite certain limitations, the Mount Washington site does have its virtues. The new Gold Line stops just below the historic museum and right next to the Casa de Adobe, providing new opportunities for visitation. Both campuses of the Autry National Center are freeway close and easy to reach. At Griffith Park, there is ample free parking and regular bus service. To serve visitors of low and fixed income, the Autry provides free admission to all facilities at both the Mount Washington and Griffith Park campuses on the second Tuesday of every month. The Museum of the American West also keeps extended hours each Thursday, with free admission from 4:00 p.m. to 8:00 p.m.

New exhibition, storage, and research facilities for the Southwest Museum at the Center's Griffith Park campus will create opportunities for greater public participation in many areas. Collaborative relationships with Native American communities will result in traveling exhibits, long-term loans, and public programs developed in the Native voice. This year the Southwest Museum will begin planning the inaugural exhibitions for the new galleries opening in 2008. Dr. Duane King, the Southwest Museum's executive director, and two new Southwest curators (positions to be filled by February 2005) will lead this planning. One exhibition, tentatively titled *The First Californians*, will explore the contributions California's indigenous peoples have made to the cultural fabric of the state. This show will be developed in partnership with many of the 28 California tribes whose material culture is represented in the collection of the Southwest Museum.

Exhibitions over the next 15 years will increasingly reinvigorate partnerships with Native American tribes that have occurred at various times in the history of the Southwest Museum. One of the museum's oldest relationships is with the Pueblo of Isleta. In 2004, Isleta received a grant from the National Endowment for the Humanities for development of an exhibition on the photographic history of the Pueblo drawn primarily from the collection of the Southwest Museum.

As the Autry National Center begins its journey to become the pre-eminent institution on the rich story of the American West, it is essential to include the voice of the indigenous peoples. The Native American Stewardship Council (discussed in Question 3) will grow over the next year from the current core group of six to include other California and national leaders in tribal government, business, academia, arts, and community affairs. Their experience and sensitivity will help guide the Southwest Museum and Autry National Center in how Native American collections are used for exhibitions, education outreach, research, community awareness and all other forms of public access. In addition to participating in the planning and development of Native American collections and programs policies, the Stewardship Council will also be charged with opening doors and advancing a variety of

collaborative efforts with Native American groups, including traveling Southwest Museum and Autry National Center exhibitions and programs to Native communities.

A Memorandum of Understanding signed last year between the Autry National Center and National Museum of the American Indian (NMAI) offers yet another opportunity for expanding public access to the Southwest Museum's Native American resources. The two institutions recognize that each has responsibilities for collections, research, and public programs relating to Native American culture and art, and that cooperation will be mutually beneficial. The development of specific projects will be subject to further agreement and available funding. The two institutions will develop and annually update a plan that identifies cooperative activities, and provides milestones, timelines, and funding strategies for them. They will also develop agreed-upon general procedures for exchanges of objects and exhibits, and for exchanges and adjunct appointments of staff. This Memorandum of Understanding can serve as a model for other collaborative agreements particularly with Native American museums who look to both institutions as resources for their own exhibits and programs.

Native American involvement on all levels of the Autry National Center will increase over the next two decades. Training programs for museum professionals, research possibilities for scholars and academicians, showcase events for fine artists and performing artists, and in-service programs for teachers are among the many career enhancement opportunities that will attract Native American and other professionals to the Autry National Center.

The Museum of the American West has a long history of creating exhibitions, publications, and public programs that have explored numerous neglected or unknown aspects of the West's history. Of particular significance have been the museum's efforts to document and interpret the diversity of cultures in the region through exhibitions such as *On Gold Mountain: A Chinese American Experience* (2001) and *Jewish Life in the American West: Generation to Generation* (2002); in such books as *Seeking El Dorado: African Americans in California* (2001); and through the *Native Voices at the Autry* theater initiative. *On Gold Mountain* was presented both in English and Chinese.

In each case, the museum has worked extensively with community groups and cultural organizations to evaluate project goals, ensure the relevance of subject matter, and reach a broad audience. Collaborators have included Self-Help Graphics, the United States Federation of Charros, KMEX-TV (Univision in Los Angeles), the Chinese Historical Society of Southern California, East West Players, the New Mexico Jewish Historical Society, the Skirball Cultural Center, the Judah L. Magnes Memorial Museum, FAME Renaissance, the World Stage, the Southern California Indian Center, and the American Indian Studies Center at UCLA. Dr. Alicia González now directs the Museum of the American West and is spearheading new efforts to work with and reach Spanish-language audiences.

The mission of the Institute for the Study of the American West is to inject fresh and exciting ideas into the exhibitions, programs, and publications of the Museum of the American West and the Southwest Museum, and to support the Center's broad educational efforts. Beyond organizing scholarly programs and providing researchers access to collections, the Institute seeks a variety of partnerships and cooperative arrangements to enlarge the Autry National Center's reach. Strategic planning for the Institute focuses on deepening connections with colleges, universities, and school districts, as well as with an assortment of libraries, museums, and historical societies. In so doing, it will build a network of relations that will collapse the wall traditionally separating the academic community from the museum world and its broader public constituency. Dr. Stephen Aron directs the Institute and is guiding its vision.

**Question 5: Tasks, Budget, Matching**

Task	Budget	Funding Source	CCHE	Match	Deliverables
<b>Conservation</b>					
<b>Phase 2</b> move 25,000 ethnographic artifacts from current storage; treat objects for pests, mold, dirt; make repairs as needed; house according to accepted museum standards	\$1,535,000	Ahmanson Fdn, Keck Fdn, Weingart Fdn, "Save America's Treasures," CCHE	\$500,000	\$1,035,000	create temporary conservation lab and climate-controlled storage at Mt. Washington campus; ethnographic objects conserved and rehoused
<b>Phase 3</b> 13,500 baskets, 11,000 ceramics, 2,200 textiles, 185,000 archaeological artifacts and archival materials	\$3,500,000	Ahmanson Fdn, Institute of Museum & Library Services, Autry trustees, individual leadership gifts, CCHE	\$1,000,000	\$2,500,000	objects conserved and rehoused on temporarily shelving in climate-controlled space at Mt. Washington campus
<b>Subtotal</b>	<b>\$5,035,000</b>		<b>\$1,500,000</b>	<b>\$3,535,000</b>	
<b>Initiate restoration of Southwest Museum building at Mt. Washington campus</b>					
<b>Electrical Systems</b>	\$484,000	CCHE	\$484,000	0	installation of: main power and distribution, emergency generator, convenience-power panel board breakers, lighting panel board breakers, lighting feeder, conduit, cable; demolition of non-historical fixtures



<b>Mechanical Systems</b>	\$74,000	CCHE	\$74,000	0	conversion of HVAC for Sprague Hall; existing heat pumps removed and water lines capped in attic; installation of new air handler and condenser unit
<b>Plumbing</b>	\$107,000	CCHE	\$107,000	0	corroded iron pipes replaced with copper
<b>Waterproofing</b> to prevent water intrusion and abatement of mold growth in key artifact areas	\$95,000	CCHE	\$95,000	0	installation of sheet membrane roofing over Caracol Tower; Poole Wing sealed
<b>Sprague Hall</b>	\$176,000	CCHE	\$176,000	0	five windows and eight skylights restored and reopened; concrete floor refurbished; walls painted; doors and hardware modified for accessibility
<b>Subtotal</b>	<b>\$936,000</b>		<b>\$936,000</b>	<b>0</b>	
<b>Initiate restoration of Casa de Adobe at Mt. Washington campus</b>					
<b>Electrical and Lighting</b>	\$120,000	CCHE	\$120,000	0	installation of surge suppression and emergency generator, lighting panel board breakers, lighting feeder, conduit, cable, new lighting; historic fixtures renovated

<b>Plumbing</b>	\$185,000	CCHE	\$185,000	0	improvements to existing public restrooms; new handicapped-accessible restroom built; upgrades to main source connection and kitchen plumbing
<b>Building Interior and Exterior</b>	\$175,000	CCHE	\$175,000	0	damaged plaster cleared and mortared; adobe cracks repaired; doors and hardware modified for accessibility; roof sealed and re-tiled; historic shutters and woodwork refinished; walls painted
<b>Security and Fire Safety</b>	\$46,000	CCHE	\$46,000	0	monitoring system and fire detection systems installed
<b>Parking</b>	\$38,000	CCHE	\$38,000	0	parking area graded and re-paved for handicapped parking and delivery drop-off
<b>Subtotal</b>	<b>\$564,000</b>		<b>\$564,000</b>	<b>0</b>	
<b>Long-Term Planning for Mt. Washington campus</b>					
<b>Public Planning Sessions</b> conducted by Fred Glick	\$50,000	Ahmanson Fdn, Parsons Fdn	0	\$50,000	plan established for best long-term use of historic museum building and Casa de Adobe by spring 2005
<b>Subtotal</b>	<b>\$50,000</b>		<b>0</b>	<b>\$50,000</b>	

New construction at Griffith Park campus					
<b>Architect Selection</b> facilitated by Gloria Gerace; includes Gerace fees, honorarium for three semi-finalists, architectural site visits by steering committee	\$100,000	California Dept of Parks & Rec (from Prop 40)	0	\$100,000	architect selected by March 2005
<b>Development and Site Preparation</b>	\$300,000	Autry trustees, California Dept of Parks & Rec (from Prop 40)	0	\$300,000	CEQA compliance; permits secured; architectural plans drawn; contractor engaged all by December 2005
<b>Construction of Southwest Museum: collection open storage and exhibit galleries</b>	\$24,000,000	Autry trustees, individual leadership gifts, grants from major Los Angeles and national foundations, corporate sponsorships	\$2,000,000	\$22,000,000	completed by summer 2008
<b>Construction of Institute and expanded education facilities</b>	\$15,000,000	Autry trustees, individual leadership gifts, grants from major Los Angeles and national foundations, corporate sponsorships, California Dept of Parks & Rec (from Prop 40)	0	\$15,000,000	completed by summer 2008

<b>Construction of Visitor Services Pavilion</b>	\$7,000,000	Autry trustees, individual leadership gifts, grants from major Los Angeles and national foundations, corporate sponsorships	0	\$7,000,000	completed by summer 2008
<b>Subtotal</b>	<b>\$46,400,000</b>		<b>\$2,000,000</b>	<b>\$44,400,000</b>	
<b>Long-Term Maintenance</b>					
<b>Endowment</b> increase funds from \$105 million to \$175 million	\$70,000,000	Autry trustees, individual leadership gifts, grants from major Los Angeles and national foundations, corporate sponsorships	0	\$70,000,000	by 2009, establish endowments for: president; directors of two museums, Institute, and Education Dept; eight curatorial chairs; exhibitions; education outreach; art and artifact acquisition; general operations
<b>Subtotal</b>	<b>\$70,000,000</b>		<b>0</b>	<b>\$70,000,000</b>	
<b>Grand Total</b>	<b>\$122,985,000</b>		<b>\$5,000,000</b>	<b>\$117,985,000</b>	

**Autry National Center Match**

Over the past two years, the Autry National Center has secured support for conservation of the Southwest Museum collection from such prestigious Los Angeles foundations as the Ahmanson Foundation, the Getty Grant Program, the W.M. Keck Foundation, and the Weingart Foundation, as well as from the Institute of Museum and Library Services. (A grant application has been submitted to the federal program "Save America's Treasures," seeking \$500,000 for Phase 2 of the conservation project.) Each of the above foundations have indicated keen interest in further support of the conservation effort, as well as in supporting construction and endowment efforts.

The Autry has already secured \$45 million in commitments for construction (\$15 million) and endowment (\$30 million) from members of its board of trustees. Further anticipated gifts and pledges from members of the Autry board, as well as from key individuals, major foundations, and national corporations will complete the matching requirement for a possible CCHE grant.

In October 2003, the Autry received a Proposition 40 Opportunity Grant of \$700,000 for new construction at the Griffith Park campus. Half the funds will be expended on planning and development, the other half on bricks and mortar. This grant is being administered through the California Department of Parks and Recreation. It is reflected in the task and budget table above only to provide a comprehensive picture of funding sources to date. The Autry will meet and exceed CCHE's 1:1 matching requirement from other sources.

## Question 6: Project Team

### Executive Oversight, Autry National Center

#### **John L. Gray; President & Chief Executive Officer, Autry National Center**

Mr. Gray was selected as the executive director and chief executive officer of the Autry Museum of Western Heritage in June of 1999. In May of 2003, with the merger of the Autry and Southwest Museums, he became the president and chief executive officer of the newly formed Autry National Center. He is also a member of the Autry National Center's board of directors. Mr. Gray serves as well on the boards of Museums West, a consortium of 10 North American museums devoted to the art and history of the American West and Native American peoples; the Community Development Technology Center; the Idyllwild Arts Foundation; and LA, Inc. (formerly the Los Angeles Visitors and Convention Bureau). He is also involved in numerous arts organizations in greater Los Angeles.

Prior to joining the Autry, Mr. Gray served as the associate deputy administrator for capital access of the Small Business Administration in Washington, D.C. He also served on the advisory board of the Community Development Financial Institution Fund and on the Finance Committee of the North American Development Bank. Mr. Gray also brings to the Autry more than 22 years of banking experience in the West. Prior to 1996, he served as executive vice president at the former First Interstate Bank of California where he was responsible for the bank's real estate activities. Before his move to California, he was with Bank Western and First Interstate Bank, Denver, Colorado, where he was also chairman of both Historic Denver and Mile High Development Bank. In California, Mr. Gray was a founding board member of the Los Angeles Community Development Bank and chairman of the California Community Development Corporation. A native of Denver, Colorado, he received his BA from C. W. Post College and MBA from the University of Colorado.

#### **Faith Raiguel; Vice President & Chief Operating Officer, Autry National Center**

Ms. Raiguel oversees all aspects of operation for both the Griffith Park and Mount Washington campuses, including finance, facilities, security, maintenance and retail. A CPA, her expertise is in arts and non-profit organizations. She has been a consultant to many arts organizations on a range of planning, budgeting and control issues. Her clients have included the Los Angeles Opera, The Music Center of Los Angeles County, Los Angeles Philharmonic and Museum of Contemporary Art (Los Angeles), among others. She is a frequent presenter and workshop leader, and has lectured at USC, UCLA, Cal Arts and the Yale School of Drama. Prior to her consulting practice, she was vice president of operations and administration for Walt Disney Feature Animation. She has also been CFO for Center Theater Group of Los Angeles. A graduate of the University of Massachusetts in history and economics, Ms. Raiguel has an MBA from UCLA and served on the faculty as adjunct professor at the Anderson School of Management. Ms. Raiguel will be overseeing the planning and implementation of the physical plant aspects of the CCHE funds. She will oversee coordination with the conservation team.

**Interpretive Oversight, Autry National Center**

**Duane H. King, Ph.D.; Executive Director, Southwest Museum of the American Indian**

Dr. King became executive director of the Southwest Museum of the American Indian in 1995. Prior to that, he was the assistant director of the Smithsonian Institution's George Gustav Heye Center, National Museum of the American Indian, in New York City. He received his M.A. and Ph.D. from the University of Georgia. His Ph.D. dissertation was *A Grammar and Dictionary of the Cherokee Language*. Dr. King previously served as executive director of both the Middle Oregon Indian Historical Society in Warm Springs, Oregon, and the Cherokee National Historical Society in Tahlequah, Oklahoma. He also was director of the Museum of the Cherokee Indian in Cherokee, North Carolina. Dr. King has taught at the University of Tennessee in Knoxville and Chattanooga, Cleveland State College, and Northeastern State University, and held the first endowed professorship awarded by Western Carolina University. He has participated as writer and/or consultant in the production of eight film and video documentaries, including the Discovery Channel's *How the West Was Lost* series, and has authored more than 50 scholarly publications on various aspects of Native American culture and history. Dr. King was the founding editor of the *Journal of Cherokee Studies* and edited *The Cherokee Indian Nation: A Troubled History* (University of Tennessee Press). Dr. King's resume is included in the application materials.

**Alicia Maria González, Ph.D.; Executive Director, Museum of the American West**

Dr. González comes to the Autry after 20 years at the Smithsonian Institute where she served as a researcher, curator, and administrator. Significant accomplishments there included curating the "living exhibition" *Rice in Japanese Folk Culture*, which brought over 40 traditional artists from seven prefectures of Japan to the National Mall in 1986. In 1988 she was appointed to head the Smithsonian's pan-institutional Columbus Quincentenary Programs, a five-year project consisting of over 120 exhibitions, symposia, films and other activities focusing on the cultural, biological, and aesthetic impact of the Columbus voyages worldwide. As part of this program, Dr. González served as lead scholar working with writer Carlos Fuentes on a five-part television series and book, *The Buried Mirror: Reflections on Spain and the New World*. Most recently, as senior curator with the National Museum of the American Indian, Dr. González did research on transnational movements with Native communities in Mexico and the United States. This research became the focus of a book, *The Edge of Enchantment: Sovereignty and Ceremony in Huatulco, México* and the exhibition *The Edge of Enchantment*. The exhibition was presented at the George Gustav Heye Center in New York City in 2002 before traveling to the Ex-Convento de Santo Domingo in Oaxaca City in 2003. This show became the basis of a community museum in Huatulco, México. Dr. González received her Ph.D. in anthropology/folklore from the University of Texas, Austin.

**Stephen Aron, Ph.D.; Executive Director, Institute for the Study of the American West**

Dr. Aron holds a joint appointment, serving as director of the Autry Institute for the Study of the American West and also as an associate professor in history at the University of California, Los Angeles. As Institute director, he oversees the Center's book and paper holdings, is responsible for developing scholarly programs that enhance the organization of exhibitions at both the Southwest Museum and Museum of the American West, and works to advance the Center's ties to the academic community. Dr. Aron received his Ph.D. from the University of California, Berkeley. His specialties

include the early United States republic, the trans-Appalachian West, frontiers, and trade. He is the author of *How the West Was Lost: The Transformation of Kentucky from Daniel to Boone to Henry Clay* (1996), and the co-author of *Worlds Together, Worlds Apart: A History of the Modern World from the Mongol Empire to the Present* (2002).

### Conservation of the Southwest Museum Collections

#### **Linda Strauss; Senior Director of Collections and Chief Conservator, Autry National Center**

Ms. Strauss joined the Autry Museum of Western Heritage as chief conservator in 1998; promoted to director of collections in 2001; promoted to senior director of collections for the Autry National Center in 2003. Ms. Strauss also serves as chief conservator of the Autry National Center. Prior to the Autry, she was associate conservator, Decorative Arts and Sculpture Department, for the J. Paul Getty Museum. She has worked as a consulting conservator for numerous institutions including the Huntington Library, Gardens and Art Gallery; the Philadelphia Museum of Art; the National Trust of England; and the Japanese American National Museum in Los Angeles. Ms. Strauss has an M.S. in art conservation from the University of Delaware, Winterthur Graduate Program.

#### **Angela Yvarra McGrew; Associate Conservator, Autry National Center**

Ms. McGrew focuses exclusively on the Native American material in the Southwest Museum collection. She is the first full-time professional conservator in the history of the Southwest Museum. Ms. McGrew has worked in museums since 1990 and spent the past five years as a conservation specialist with the National Museum of the American Indian, Research Branch in New York. She received her M.A. in Anthropology and Museum Studies from California State University, Chico, where she specialized in Native American culture and history.

#### **Lisa Forman; Project Manager and Lead Conservator for Southwest Museum Conservation**

Ms. Forman has been in private practice since 1991 serving museums, galleries, and collectors in the Los Angeles area. She has participated in the design and execution of institutional survey and treatment projects for Walt Disney Imagineering; the Huntington Library, Gardens, and Art Gallery; the Los Angeles County Museum of Art; the Norton Simon Museum; and the University of California, Santa Barbara. Prior to the creation of the Autry National Center, Ms. Forman surveyed and selectively treated the Hodge and Cushing archives at the Southwest Museum's Braun Research Library. Institutional clients include the Japanese American National Museum, UCLA Special Collections, the Skirball Museum and Cultural Center, Phoenix Art Museum, Santa Barbara Museum of Art, and the Corita Kent Archive at Immaculate Heart. Ms. Forman received a Master of Fine Arts in Art and Art History from UCLA and trained in conservation under Griselda Warr (Huntington Library) and Olivia Primanis.



### **Mount Washington Rehabilitation & Long-Term Planning**

#### **Levin & Associates Architects; Historic Structures Assessment and Rehabilitation Study**

Founded in 1980 by Harvard-educated architect Brenda A. Levin, the urban planning and architecture firm, Levin & Associates, received worldwide attention early in the decade for its revitalizing historic preservation work on some of Los Angeles' most-beloved landmarks. In the intervening 20 years, the firm's profound concern for enhancing urban memory and the humanity of a project has positioned it to be an active problem solver in the issues and neighborhoods of a complex city and region. The scope of Levin & Associates' work includes urban design and master planning, large-scale renovation and adaptive re-use of historic buildings, and the design of new institutional, commercial, and multi-family housing facilities. Geographically, the firm's project sites blanket Southern California. Its renovation and adaptive re-use work has included the James Oviatt, Fine Arts, and Bradbury buildings, the Grand Central and Chapman markets, Pellessier Building and Wiltern Theater, and the seismic rehabilitation of City Hall. In process are the renovation of Griffith Observatory and the Frank Lloyd Wright buildings at Barnsdall Park. Although primarily intact, all of these buildings suffered from serious neglect and damage prior to renovation.

The firm's recent arts projects have transformed existing facilities into highly-regarded new spaces. At the University Art Museum, the University of California, Santa Barbara, Levin & Associates created a more visible and distinctive identity for the arts facility; and, at The Huntington Library, Art Collections and Botanical Gardens in San Marino, a former carriage house, now the Mary Lou and George Boone Gallery, has been transformed into a space for visiting exhibitions. The Los Angeles Conservancy has selected the project for a 2000 Preservation Award. Among the legendary architects on whose designs the firm has worked are Frank Lloyd Wright, Rudolph Schindler, Myron Hunt, Gordon Kaufmann and John Parkinson. These projects have provided the firm with an opportunity to master the intricacies and nature of the details and materials of design and construction.

#### **Economic Resource Associates; Economic Analysis of Mount Washington Campus**

Economics Research Associates (ERA) is an international consulting firm focused on economic analysis for the entertainment and leisure industry, real estate development, public-policy analysis, tourism, and economic development. Since its founding in 1958, ERA has completed over 15,000 assignments yielding unmatched experience in land use economics. In broad terms, ERA assists private developers and public agencies in assessing the future economics and outcomes of real estate projects and economic development plans. ERA offers a diverse array of economic analysis and tools to answer complex problems. Clients in the museum world include the Getty Center (Los Angeles), the American Museum of Natural History, Rose Center (New York), Yerba Buena Center (San Francisco), Kennedy Space Center (Florida), Henry Ford Museum (Michigan), California Museum of Science and Industry (Los Angeles), California Academy of Sciences (San Francisco), National Center for Latino Arts and Culture (San Antonio), Museum of Jewish Heritage (New York), Milwaukee Public Museum, and the Royal Armouries Museum (Leeds, U.K.).

### **Fred Glick; Facilitator, Public Planning Sessions**

Vice president of Huitt-Zollars, Inc. in Seattle, Mr. Glick is an urban designer and landscape architect specializing in the planning and design of complex projects often requiring sensitive treatment to fit into an existing community or sensitive environment. His experience includes urban design, site analysis, site planning, land planning, community design, landscape architecture, transitways and transportation, urban waterfront and resource use master planning. Mr. Glick has received three national awards for urban design on transitways in Los Angeles, California, and Portland, Oregon. These include station area planning and corridor design. His work has been distinguished by his ability to organize and direct complex projects, resulting in a clear and logical synthesis of the issues. Mr. Glick thoroughly enjoys working closely with his clients and the public to build consensus on projects often characterized with challenging issues. Currently, he is coordinating development of a Linkages Master Plan for Northeast Los Angeles working closely with the Los Angeles City Council.

Mr. Glick has spoken at numerous international, national, regional and local conferences on urban design, public involvement, project planning and design, station area planning and process facilitation and has published articles in professional journals and has served on research panels for the National Academy of Science and Engineering. He has coordinated special events, and lectured on the relationship between land use and transportation. Mr. Glick has taught urban design and planning and lectured at universities and colleges in the Northwest, specifically on transit and urban design. He serves on King County's Smart Growth Advisory Committee for Land Use, Transportation, Air Quality and Health and is chairman of the City of Mercer Island Design Commission. Recently, Mr. Glick served as a member of the Puget Sound Regional Council's Transportation Policy Board.

### **Construction at Griffith Park**

#### **Gloria Gerace; Architect Selection**

Ms. Gerace is an independent consultant specializing in planning and management services for building, exhibition, and publication projects in the arts. Significant projects have included the creation of architecture programs for the UCLA Broad Art Center and the Huntington Library, Art Collections, and Botanical Gardens; development of the exhibition *Walking with Our Ancestors* for the Los Angeles Zoo; and strategy development for an institutional history program at the J. Paul Getty Trust.

From 1984 to 1997, Ms. Gerace served as project manager for the J. Paul Getty Trust, overseeing the Getty Center Building Program from its inception to public opening. Responsibilities ranged from architectural programming and research to space planning and design reviews, and included directing the documentation of the Getty Center building project. While at the Getty Trust, Ms. Gerace also developed an architectural program focusing on the History of Art and the Humanities for the Getty Research Institute; this included specifications for conservation studios, photographic labs, library shelving, and special collections storage. She directed a needs analysis, RFP, and selection process for a transportation system, developed auditoria and conference room needs analyses and a subsequent architectural program, and produced an architectural program for several office remodel projects during construction of the Getty Center.

Following the Getty, Ms. Gerace served as deputy director, administration for the UCLA Hammer Museum. There she oversaw the departments of communication, finance, human resources, security, and operations. Ms. Gerace received Master of Arts degrees in classics from the University of California, Irvine and in museum education from George Washington University.

**Capacity, Autry National Center**

**Holly Preble; Vice President for Advancement, Autry National Center**

Dr. Preble leads the fundraising, marketing, and communication departments of the Autry National Center. The Center is building a large national base of membership support, as well as a comprehensive advancement program to deepen funding relationships with individual, corporate, foundation, and government donors. Dr. Preble brings over 15 years of advancement and capital campaign experience to the Autry. Previous positions include executive director for development at the USC School of Engineering, associate vice president of development at Harvey Mudd College, and vice president for membership development and special projects with Town Hall Los Angeles. Dr. Preble earned her Ed.D. from the University of Southern California and holds a BA in art from California State University, Sacramento.

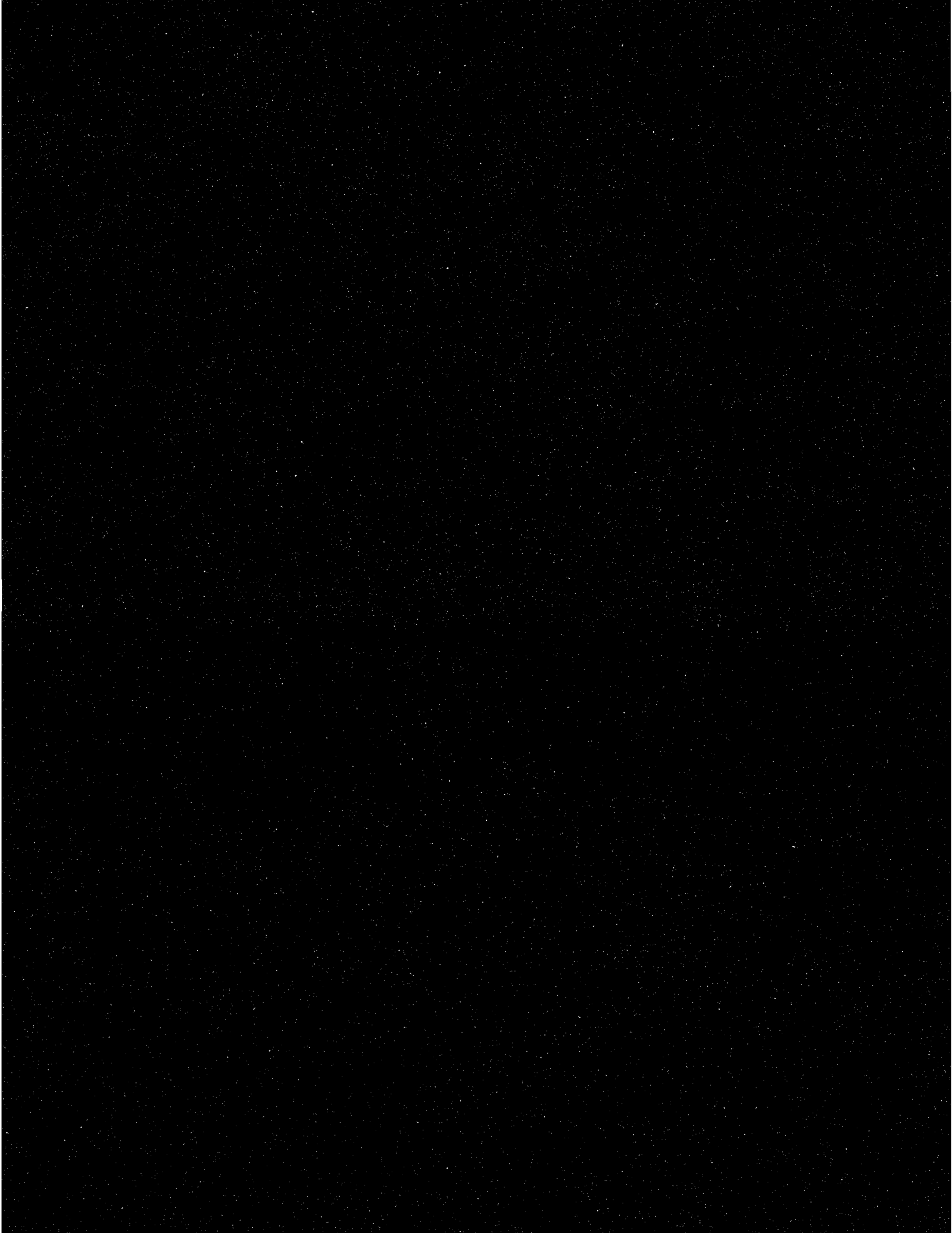
**Lynne LaMarca Heinrich, Martz & Lundy; Comprehensive Campaign Consultants**

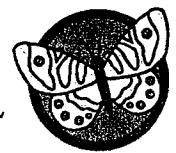
Since 1926, Martz & Lundy has been a leader in promoting successful philanthropic programs, counseling clients in fundraising fundamentals such as major gift strategies, planned giving, capital campaign planning and management, communications and prospect research. The firm has pioneered many services including feasibility studies, consultation gatherings, Electronic Screening® and Mid-level Donor Analysis®. Martz & Lundy consultants have an average of 20 years of field experience before joining the firm.

Ms. Heinrich joined Martz & Lundy as a senior consultant in 2000. She has served in staff and consultant roles to the nonprofit sector for more than 23 years having worked with a varied client portfolio including educational institutions, museums, performing and visual arts organizations, hospitals and medical centers, health and human service agencies, environmental organizations, foundations, corporations, venture philanthropists, and numerous public-private partnerships. Ms. Heinrich provides consulting services in all aspects of fundraising, capital campaigns, management, board governance, strategic planning, leadership coaching and development to nonprofit organizations. She has served as the executive director of the Stern Grove Festival Association, and held senior advancement positions with San Francisco Opera, Exploratorium, The Johns Hopkins Medical Institutions, Vassar College, and The Culinary Institute of America. Currently, she serves as a Lecturer at the Haas School of Business, University of California, Berkeley, where she teaches board governance in the Nonprofit Management Program. She is also a member of the Board of Directors of Martz & Lundy.

**Thomas N. Clough, Horizon Associates; Strategic Economic Modeling**

Since 1989, Mr. Clough has been principal of Horizon Associates, a consulting group that provides planning services for a broad range of non-profit organizations. His work focuses on strategic, financial, and organizational planning for non-profits, particularly those that face major challenges in funding their missions. Mr. Clough received his bachelors degree in economics from Harvard and his doctorate in business administration from Harvard Business School. With Cambridge Associates in Boston, he served as an investment consultant, advising university, college, and foundation endowments on investment objectives, spending policy, asset collection, investment management selection, and performance measurement. He also led planning projects for a variety of non-profits. Mr. Clough has taught management policy at Boston University's Graduate School of Management and Harvard's Kennedy School of Government. He has also written case studies on business policy, organization design, and management control, including a best-selling case on Corning Glass. He co-authored *Chronicles of Corporate Change*, a book on the restructuring of the Bell System.





California Cultural and Historical Endowment  
Grant Application Face Sheet

Applicant Name:

(Organization or Public Agency) Julia Morgan Center for the Arts

Applicant Address:

2640 College Avenue

Berkeley, California 94704

Public Contact

Regarding this Project:

Sabrina Klein, Executive Director

Public Contact Telephone:

(510) 845-8542, ext. 304

Facsimile:

(510) 845-3133

E-mail:

[sabrina@juliamorgan.org](mailto:sabrina@juliamorgan.org)

Non-profit Organization Federal

Employer Identification Number: 94-2626454

---

Name of Project:

(Short Title)

JMCA Total Stabilization and Capital Improvement Project

Project Amount

(Total Amount of Project):

\$2,008,900

Amount you are Requesting from

CCHE:

\$303,900

Project Location:

(Indicate exact address,  
City and County)

2640 College Avenue

Berkeley, California 94704

County of Alameda

Anticipated Project Start Date:

Planning and urgent repairs begun February 2000  
(if you have already initiated your project, indicate that date)

Anticipated Completion Date:

September 2008

Location Latitude and Longitude: Lat 37.862092 Lon: -122.253685

Website Address (if applicable)

[www.juliamorgan.org](http://www.juliamorgan.org)

Part One – CCHE Face Sheet

Brief Project Description:(please use the space provided below)

The Julia Morgan Center for the Arts (JMCA) in Berkeley, or “Old St. John’s” as some local residents still call her, is the oldest public building created by Julia Morgan that is still standing. As California’s first, and still foremost, woman architect, Morgan won the bid in 1908 by submitting the least expensive proposal, bringing the entire project in at under \$2 per square foot (for comparison, average new construction at the time was between \$10 and \$20 per square foot). Constructed entirely out of old growth redwood, with 280 windows and an intimate sanctuary with soaring beamed ceilings, the building stands as a monument to Morgan’s sense of grace, warmth and personal experience. Especially seen as part of the trajectory of Morgan’s work that includes Hobart Hall, Chapel of the Chimes, and finally Hearst Castle in San Simeon, this building deserves its place on the national registry of historic places as a building of local significance. It is a Berkeley historical landmark, holding a privileged place as a prime example of the Arts and Crafts movement in California, among the very first buildings to become a registered landmark with the City of Berkeley at the first meeting of the Berkeley Preservation Commission in December 1975.

Morgan’s work and Morgan herself continue to be under-appreciated by the general public as part of California’s unique identity, and the JMCA is positioned to honor her and her accomplishments. We provide a singular example of her dedication to the principles of a regional style of architecture that celebrates natural environment, natural materials, domestic hospitality, and an integrated life.

Our Stabilization and Capital Improvements Project aims to repair years of benign neglect and to ensure the durable use of the facility for many decades beyond our centenary in 2008. Unglamorous but critical roof repairs, drainage and runoff containment projects, and numerous critical improvements to the 22,000 square feet of much-used space will ensure that the building continues to serve as the earliest public building designed by Morgan that is available to the entire community.

**CCHE Use Only:**

Department Reference No.:

Bond:

Budget Year:

Award Date:

Type of Award:

Project Type:

## QUESTION ONE: Project Description and Project Goals

**Project Site and Background:** The Julia Morgan Center for the Arts (JMCA) in Berkeley, or “Old St. John’s” as some local residents still call her, is the oldest public building created by Julia Morgan that is still standing. As California’s first, and still foremost, woman architect, Morgan won the bid in 1908 by submitting the least expensive proposal, bringing the entire project in at under \$2 per square foot (for comparison, average new construction at the time was between \$10 and \$20 per square foot). Constructed entirely out of old growth redwood, with 280 windows and an intimate sanctuary with soaring beamed ceilings, the building stands as a monument to Morgan’s sense of grace, warmth and personal experience. Especially seen as part of the trajectory of Morgan’s work that includes Hobart Hall, Chapel of the Chimes, and finally Hearst Castle in San Simeon, this building deserves its place on the national registry of historic places as a building of local significance. It is a Berkeley historical landmark, holding a privileged place as a prime example of the Arts and Crafts movement in California, among the very first buildings to become a registered landmark with the City of Berkeley at the first meeting of the Berkeley Preservation Commission in December 1975.

**Project Description.** When the congregation of St. John’s discovered they could not move their beloved facility across the street to their new land site in the late 1960s, they proposed to sell it to a developer who had been purchasing property in the neighborhood and building badly needed (but decidedly unattractive) high-density concrete buildings. The neighbors and many members of the congregation campaigned hard to preserve the building, an early instance in Berkeley’s history of historical preservation in the face of commercial interests. This grassroots campaign was successful in keeping the building standing, but obviously did not provide any means for maintaining, improving and utilizing the facility.

While a deeply loved facility since it opened in 1908, the building has largely been unfortunately managed and often amateurishly maintained, resulting in a variety of continuing and emerging problems that threaten the building’s viability as a public arts center. Many important improvements were made during the 1980s and 1990s, especially under the architectural eyes of Bendrew and Lorraine Jong, who unsuccessfully ran the facility as a for-profit theatre before reverting to the JMCA’s nonprofit status. Now approaching her 100<sup>th</sup> anniversary, the JMCA is in desperate need of long-term stabilization and capital improvement, which has been in planning since December 1999.

The building was rescued at that time from the county’s auction block by the timely emergence of a couple who wished to save the building and ensure its continued use as a public benefit arts facility. The couple was able to make a one-time gift of \$550,000 to stabilize the flailing organization, eliminating all urgent debt except for the \$1.2 million mortgage, and hiring a qualified staff to revitalize and grow the organization. With their reversal of fortune in the spring 2000, they were unable to continue significant financial support, but they remain on the board of directors and have ensured a carefully researched, thoughtful approach to making the building safe, welcoming, artistically and educationally viable, and able to meet future demands on its services, facilities, and resources.



## PROJECT GOALS

### **JMCA Total Stabilization and Capital Improvement Project**

The JMCA staff, board and Architectural Advisory Council have been researching and planning a stabilization effort since 2001 to ensure that

1. The JMCA is owned outright by the 501(c)3 public benefit corporation, paying down the entire \$1.2 million mortgage still owed 25 years after its incorporation. In the past 20 years, the building has twice been purchased for private, for-profit use. Each time, significant building improvements were made, but the businesses failed, requiring the nonprofit to assume ownership under adverse conditions. After almost 30 years as a 501(c)3, the mortgage remains a burden that hampers investment in capital improvements. (We are not requesting CCHE funding for this, but think it's important to note that it is key to the project's success.)
2. Urgently needed upgrades and repairs occur in a timely, professional and thorough manner, preventing the recurrence of problems that have plagued the facility in the past. JMCA is owner, landlord, rental agent and program service provided all in one, and until January 2000 lacked sufficient staff and experience to manage all simultaneously. Many repairs were insufficiently planned and executed, creating long-term problems for the facility. Other repairs are already 20 to 30 years old and require significant upgrades.
3. Long-term planning occurs to ascertain the needs of the aging facility, restoring the details that make it uniquely Julia Morgan's design, and ensuring its proper place in the Berkeley landscape.
4. Positioning the building in relation to Julia Morgan's other local work and in the trajectory of her important contributions to the cultural landscape of California from San Luis Obispo to Eureka.

Julia Morgan's honorary Doctor of Law degree from the University of California in 1929 reads in part

Distinguished alumna of the University of California; Artist and Engineer; Designer of simple dwellings and stately homes, of great buildings nobly planned to further the centralized activities of her fellow citizens; Architect in whose works harmony and admirable proportions bring pleasure to the eye and peace to the mind.

Morgan's work and Morgan herself continue to be under-appreciated by the general public as part of California's unique identity, and the JMCA is positioned to honor her and her accomplishments. We provide a singular example of her dedication to the principles of a regional style of architecture that celebrates natural environment, natural materials, domestic hospitality, and an integrated life. Architectural historian Susan Cerny once told JMCA staff that she couldn't think of a single other building named in honor of its architect. We are proud of the founders of the nonprofit entity for honoring Morgan's accomplishment in Berkeley history, architectural history, women's history, and environmental history. We look forward to preserving what one architectural critic calls Morgan's "aesthetic chemistry that turned Beaux-Arts designs at their finest into architecture of disconcerting richness and originality."

## Question Two: Project Audience and Needs Assessment

**Audience: Clients, Patrons, and Participants.** The JMCA currently welcomes more than 55,000 people each year to our facility, among them our co-tenants, artist clients and their audiences, our own classes and workshops, and drop-in visits from dozens of tourists and locals each month who are interested in this Julia Morgan masterpiece. Located in an active mixed commercial and residential neighborhood, we sell over 60% of our theatre tickets to people who are walking by or live nearby, although some of our performances bring audiences from Marin, Concord and San Francisco, depending upon the artist. Over 90% of our visitors come from within a 20-mile radius; drop-in visitors seeking a tour come from all over the world.

Artists and performance companies who use our stage include locals representing world and folk traditions, new and experimental art forms, and classical repertory in dance, music and theatre. A sampling from the past five years includes many who return to the theatre annually, using the JMCA as their artistic home: Mahea Uchiyama Center for International Dance, Berkeley Ballet Theatre, Berkeley Opera, Jyoti Rout Indian Dance, Grupo Andanza, Cypress String Quartet, Traveling Jewish Theatre (East Bay Season), Splash Circus, Will Durst, Word for Word and regular concerts of Persian, Turkish, Indian and other ethnic music and dance.. At the time of this writing, the coming month has performances scheduled that include St. Xenia Orthodox Church presenting Archiglas Acapella Choral Ensemble; Mike Vax Jazz Orchestra; California Revels' *Holiday Prelude*; Vietnamese Performing Arts Group presenting Danny Nguyen and Nguyen Dance Company; DC Productions presents hip-hop City Shock Dance in *Above and Beyond*; and the 8<sup>th</sup> annual Asian Business Association's fundraising fashion show.

(See <http://www.juliamorgan.org/archives/2004/perf2004.shtml> for other events in 2004.) We expect significant improvements to attract other local artists and hence new audiences for many years to come.

**Audience: Co-tenants.** The JMCA serves as owner/landlord of the facility, manager of the theatre, producer of some local artistic events, provider of artistic workshops and classes, and an active affiliate of the Lincoln Center Institute for Arts in Education (LCI) out of New York. Through our LCI affiliation, we run an Institute for artists and teachers in using arts-based learning methodologies to improve teaching and learning in K-12 classrooms. JMCA staff take leadership roles in arts learning conversations throughout Alameda and San Francisco counties, and provide workshops as far afield as Los Angeles and San Bernardino through contracts with various state and county agencies offering technical assistance to educators, artists and arts administrators.

When new management was brought on in January 2000, JMCA staff convened long time co-tenants the Yoga Room (30 years onsite), the Berkeley Ballet Theatre (27 years) and Hearts Leap Preschool (8 years) to create a shared vision for the facility. Up to that time, tenants acted in isolation from one another and often in adversarial relationship to JMCA management. In the past four years, we have successfully evaluated our facilities needs; worked jointly on numerous small but important capital improvement projects with shared volunteers and financial resources; and developed an ongoing conversation in quarterly meetings to make continuing progress on our joint desire to see our lovely building restored to her former strength.

**Needs Assessments: Assessment of the facilities' needs:** In addition to regular meetings with co-tenants, JMCA staff and board have taken important assessment steps to plan for measured growth, ensuring our capacity to act prudently on urgently needed repairs as well as work towards larger projects. Our research and planning process to date:

**1. A thorough independent inspection of the building** was completed to prioritize repairs and to lay groundwork for a long-term plan in February 2000. Conducted by Dave B. Heilig of Metro Inspection Services (engineer lic. #17620, contractor lic. #467812), the inspection and the resulting 30-page report continue to guide our work plan. The most telling part of the inspection occurred after 8 hours of the roof-to-basement process, from which Heilig emerged filthy and grinning, saying, "I have always admired Julia Morgan as an architect, but she has been seriously under-appreciated as a structural engineer." The building, for all its age and constant public use, is seismically sound, beautifully engineered, and capable of lasting another 100 years as a testament to the art of California's most eminent woman architect.

**2. Establishment of an Architectural Advisory Committee (AAC)**, with support for assessment and research from a Nonprofit Facilities Fund grant in December 2000. An introductory paragraph in their final report states that: "Over the years, different arts groups have taken on the Julia Morgan Center attempting to make this beautiful building their home. Invariably they ran up against problems related to ability to best manage the facility's economic and maintenance demands. The building became a Berkeley Historical Landmark in 1975 and was entered on the National Historic Register in 1974 (#74000507). Neither of these facts is generally known to the public (either clients or audience) or to local funders. Many improvements have been made over the past 25 years, including a sensitive transition from the sanctuary to a working theatre space, but many other improvements and much basic maintenance has been deferred for many years. The entire facility, including the theatre and studio spaces, remains elegantly homey but suffers from neglect, spotty planning, and lack of funds. In addition to erratic maintenance and repairs, the facility's reputation had suffered from many changes in management, apparent eccentricities in contract negotiations, an unclear mission, and other forms of miscommunication." The AAC outlined recommendations to assist the now stable organization "in proportion to ability to grow the capabilities of the facility" and to begin preparing "now" (early 2001) for major capital work to occur before the building's centenary in 2008.

The AAC evaluated community perceptions (which include misconceptions about ownership of the facility and its public activities), the nature of JMCA current and potential future co-tenants in relation to the organization's public identity, current programming and potential future programming opportunities, commissioned detailed and correct architectural drawings (as many inaccuracies were revealed in previous blueprints), and prioritized capital needs.

**3. The planning and completion of urgently needed upgrades and repairs** (sewage, electrical, structural, partial roofing, etc.) to ensure the safety and viability of the building at a total direct cost to date of nearly \$200,000. Successful completion of these projects in phases tailored to our resources has taught staff, board and a team of contractors how best to provide critical maintenance and repair services to the Julia Morgan Center for the Arts.

### **Question Three: How does this project fit into the priorities of CCHE?**

When most people hear the name "Julia Morgan" they think first, and often only, of Hearst Castle in San Simeon. Although Morgan designed over 700 buildings in her lifetime, her name is usually associated solely with the opulent Hearst estate, and if an extension is made from that association, it is with Morgan's long-term relationship with the Hearst family, beginning with significant commissions from Phoebe Aperson Hearst early in Morgan's career. The deeper truth is that Julia Morgan's body of work heralded a significant change in American architecture that continues to have an impact on Californian architecture and on the nature of many San Francisco Bay Area favorite buildings and neighborhoods.

Architectural historians Leslie Mandelson Freudenheim and Elisabeth Sacks Sussman wrote about this important architectural contribution in their book, *Building with Nature: Roots of the San Francisco Bay Region Tradition* (1974, Peregrine Smith, Inc.) They identify the Bay Area architectural style as one that shaped an "aesthetic awareness of landscape" which has become known as the native style of the region. Of course, they write, "the influence of the land itself" contributed to this distinctive style which, far from being derivative, "synthesized and harmonized many elements in creating a distinctive regional idiom." Tellingly, Freudenheim and Sussman chose photographs of the interior of the Julia Morgan Center for the Arts (in its original incarnation as St. John's Presbyterian Church) to illustrate the cover of their book.

Working almost exclusively in California, Morgan included elements in her designs that are intrinsic to the local environment. The JMCA is designed and built completely from old growth redwood (literally an irreplaceable natural resource), making the building's low profile look as if it had sprung most naturally from its environment. Although referred to by one architectural historian as "an extraordinary small building of large significance," it is actually over 22,000 unpretentious square feet of teeming cultural activity, sitting in the heart of a residential and commercial neighborhood surrounded by homes designed by Julia Morgan and other period architects.

To appreciate how Julia Morgan fits into the scope of change in twentieth century Californian history, her singular achievements need to be seen in relation to the history of women's rights, women's accomplishments in what had been traditionally male-dominated professions, and the architectural history of the San Francisco Bay Area. Born in San Francisco in 1872, Morgan grew up in Oakland. In 1894, she was the only woman to complete an undergraduate degree in Civil Engineering at the University of California in Berkeley. She proved that she had the passion, the skills and the ambition to excel in a field that was previously open only to men. Her determination was key when she attempted to enroll in the prestigious L'Ecole des Beaux-Arts in Paris. She was denied enrollment for two years, solely because the school had never before admitted a woman. Her determination was rewarded when she competed in and won several architectural competitions in Europe and the school was no longer able to deny her skill. She became the first woman to be granted L'Ecole des Beaux Arts certificate in 1902. Morgan returned to San Francisco, where she continued to make history.

After returning to San Francisco, she worked with architect John Galen Howard who had secured a contract with the University of California--Morgan served as project director for the Greek

Theater. In 1904, she opened her own office and gained a number of residential commissions in the Bay Area. Morgan was securing contracts based upon her style, expertise and her willingness to work within the financial constraints of her clients. The fact that she was a woman simply was not an issue. Sixteen years before women had the right to vote, Julia Morgan was in the forefront of a great social change. Morgan disliked being known as the “woman architect”. She wanted only to be appreciated for her work, not to receive additional attention because of her gender.

The devastation of the 1906 earthquake created an exodus from San Francisco; many people moved to the East Bay believing that it was safer. Her first East Bay commission after the earthquake was St. John’s Presbyterian Church, now the Julia Morgan Center for the Arts. With this extraordinary building the design elements that transformed American architecture are evident. Morgan used materials exclusive to the California environment. As you look at the outside of the building, what is most striking is how well it blends into the natural environment. The building represents the diversity of Julia Morgan’s style: in contrast to Hearst Castle which dominates its surrounding landscape, the Julia Morgan Center for the Arts truly is one with the surrounding landscape. Morgan’s diverse architectural accomplishments are largely unknown and under-appreciated by the general public. The preservation of the Julia Morgan Center for the Arts brings her legacy to life.

Our building is also an active cultural space. Since 1973 we have provided a home to a variety of cultural groups. A partial list of those who performed here in 2004 is included in Question Two above, but there is no doubt that the cultural fabric of the Bay Area can be seen month after month on our stage. The building is an active, thriving place for the community to experience the arts.

Julia Morgan is a key figure in the history of California. We believe that the preservation of her elegant building that now bears her name will help acknowledge and enhance her reputation. Many Morgan buildings in the regional tradition are private homes and are very rarely available to the public to develop an appreciation of her contributions to the way we live now. In Berkeley, artists, audiences, students and families associate Morgan’s name with our theater camps and other cultural events. The Julia Morgan Center for the Arts is uniquely qualified to promote Morgan’s reputation and her key contributions to a style of living that is welcoming, domestic, in harmony with its environment, affordable, gracious and durable.

Berkeley Preservation Commission seeks to honor properties that meet at least one criteria: that they are significant of its type in the region, outstanding examples of movements or the work of an architect, add exceptional value to the neighborhood fabric, are associated with a movement, are worth preserving for their usefulness as an educational force, or embody and express the history of the region. Bingo—the JMCA meets each criterion, exceeding the most demanding expectations of those most committed to honoring the best of California’s culture and history. It truly deserves to be cherished by and open to a public that has benefited so intimately from the life work of its architect.

Very few quotes survive from Julia Morgan herself. She preferred not to describe her work, saying that “architecture is a visual, not a verbal art.” When you enter the Julia Morgan Center for the Arts and experience the natural beauty of the building, you can clearly hear her voice.

#### **Question Four: Ongoing Maintenance and Public Accessibility**

**Project Maintenance:** Because the JMCA is currently a stable 501(c)3 with reliable earned revenue from long-term tenants and program fees, we see no difficulty maintaining the facility and ensuring, even increasing, its continued public use. Since 2000, operating revenues have been steady. Capital improvements to the facility will in fact ensure our ongoing ability to provide artistic venues for more local artists; to increase our outreach to the community; and to increase our ability to offer scholarships and sliding fee services to more at-need families and schools.

**JMCA current operations includes earned revenue from reliable sources:**

**Rents from long-term tenants,** with current contracts through 2008. The longevity of our relationships with Berkeley Ballet Theatre, the Yoga Room and Hearts Leap Preschool make renewal and extension of these contracts virtually inevitable. Revenues permit us to pay all facilities' costs, insurance, routine maintenance and management, and ensure oversight for successful use of the entire facility. These revenues are sufficient for JMCA staff to run the facility for public access even if other income streams for programs fail.

**Tuition and fees for service,** which have maintained a steady pace since 2000. This revenue stream supports staff for these services.

**Theatre rental income from local artists and organizations,** increasing steadily since 2000. In 2003 for the first time in the theatre's history, income from rentals paid for staff and overhead required to book, tech, manage, and clean the theatre itself. We anticipate no significant decrease, and in fact a potential significant increase, in the appeal of the theatre to local artists. Capital improvements to the theatre will bring new groups to the JMCA and hence, new audiences, increasing our public service.

**Donations from individuals,** which for the first time in JMCA history is maintained through a structured approach to an annual campaign. The planning and initial implementation of our first annual donor drive was supported by a grant from the Nonprofit Finance Fund; we continue to build our infrastructure for increasing annual support, leading to a larger, more aggressive campaign in 2008, our centenary.

**Donations from foundations,** many of which continue to support our programs and their related operating costs for overhead on an annual basis. While there is never any guarantee of continued private support, our record to date indicates we have the ability to attract programmatic and some operating support from major local foundations such as the William and Flora Hewlett Foundation, the Walter and Elise Haas Fund, the San Francisco Foundation and others. Although just beginning our fundraising for capital improvements, we find ourselves at a fortunate moment able to seek support from new funding streams, including the CCHE at the state level and the Northern California Community Loan Fund's (NCCLF) Performing Arts Space locally.

We expect CCHE funds to join additional funding sources to move our stabilization and capital improvement plans forward, anticipating our centenary in 2008. We are hopeful of qualifying for funding from the NCCLF capital program; a request for \$195,000 is pending. The Wayne and Gladys Valley Foundation, a previous \$25,000 donor in 2002 for Phase I of our roof replacement, is considering a request for \$65,000 for additional capital improvements. A private



donor has pledged at least \$30,000 in 2004 and 2005 for matching purposes (this same donor gave a \$30,000 match in 2003 for a Walter and Elise Haas grant for programmatic support).

**Refinancing:** In February 2004, we were finally able to refinance our disadvantageous mortgage, which was negotiated before current management was hired while the building was under duress from the County of Alameda for back taxes not paid when the building was run as a for-profit entity in the early 1990s and was underutilized as a community resource with limited earned revenue. Four years of fiscally responsible management, three outside audits, and a significant multi-year improvement in both earned and contributed revenue made us a more attractive candidate for East West Bank, which refinanced our 7.7% mortgage at 5.2% (netting a cash gain to our capital improvements budget of over \$20,000 per year for the next five years) and also provide a line of credit of \$100,000 (our first cushion in over 10 years). A fiscally conservative board limits indebtedness to emergency needs and requires a plan for paying back the line of credit within a reasonable time frame. Except for the paper numbers of depreciation, JMCA carries no debt except for its \$1.2 million mortgage.

In the refinancing process, the building and the management were appraised to determine the value of the property. "Primary positive risk evaluation considerations" included these notes (*Complete Appraisal in a Summary Appraisal Report: Live Stage Theatre and Arts & Education Center, Julia Morgan Center for the Arts*, Prepared for East West Bank by Integra Realty Resources, San Francisco, February 2004):

- Acclaimed and irreplaceable historical landmark building that gives great appeal to spaces for performance and studio-use has ensured long term tenant and user demand
- Located in desirable Berkeley residential neighborhood at end of commercial district, within walking distance of campus. . . .
- Versatile spaces for many uses, including theatre, studio, school, offices
- Limited competition or potential for new development
- Market Environment: positive, active arts community and need for preschool and classes in dance and yoga
- Tenant stability very positive; most tenants have long occupancy histories
- Except for roof . . . building is structurally sound, with full sprinklering.

We are confident that these "positive risk considerations" will ensure public access to the Julia Morgan Center for the Arts for decades to come.

Last year, we prematurely announced public tours of the JMCA in an article about Julia Morgan's legacy that appeared in *Sunset* magazine, February 2003. We now plan to inaugurate docent-led tours the first Saturday of each month, following significant capital improvements to the public spaces in the building.

**Question Five: Tasks, Budget and Matching Requirement**

Tasks Description	Task Budget	All Funding Sources	CCHE Funding	Matching Funds	Deliverables
<b>Roof Replacement</b>					
Architectural design, documents, bidding and permits	4,500	CCHE Operating funds	2,000	1,000 op funds 1,500 architect in-kind	Blueprints City approvals Permits
Roof replacement	326,000	CCHE NCCLF Operating funds Private donors	163,000	90,000 NCCLF 20,000 Op funds 53,000 Private	New shingle roofing, insulation, gutters, downspouts, and repairs to wood façade details
<b>Electrical upgrades</b>					
Add circuits Increase service capacity Remove hazardous wiring, upgrade with respect for original knob and tube wiring Install automatic lighting at exits, as needed	18,000	CCHE Valley Foundation NCCLF	9,000	3,000 Valley 6,000 NCCLF	New PG&E service Expanded circuit boards Upgraded knob and tube wiring Improved interior and exterior lighting



Tasks Description	Task Budget	All Funding Sources	CCHE Funding	Matching Funds	Deliverables
<b>Drainage and run off containment</b>					
Assessment of problem/solutions	1,500	In-kind Services Operating funds	N/A	1,500 Hydrogeologist in-kind (Rob Gailey)	Analysis and recommendations
Architectural drawings Design, documents, bidding and permits	3,500	CCHE NCCLF	1,750	1,750 NCCLF	Blueprints, city approvals, permits
Remove sand/pour concrete/lay pipe/ensure design	57,500	CCHE NCCLF Wayne & Gladys Valley Foundation	28,750	14,000 NCCLF 14,750 Valley	Redirection of water flow to stop flooding, reduce water damage to foundation.

Tasks Description	Task Budget	All Funding Sources	CCHE Funding	Matching Funds	Deliverables
Acoustical isolation between BBT Studios and Yoga Room	\$1,700	CCHE In-kind installation NCCLF	700	500 in-kind 500 NCCLF	Design and install sound resistant linings to suppress generated noise and provide a satisfactory degree of acoustical isolation for adjacent occupied spaces.
Hardwood floor refinish @ 10,000 s.f.	15,750	CCHE NCCLF Valley	7,500	5,000 NCCLF 3,250Valley	Original flooring-safe and durable restoration

Hardwood floor repair/refinish Studio A/Hearts Leap	8,500	CCHE NCCLF Valley	3,000	3,000 NCCLF 2,500 Valley	Repairs to damaged flooring, finished to original condition

Tasks Description	Task Budget	All Funding Sources	CCHE Funding	Matching Funds	Deliverables
<b>Plumbing and HVAC repairs/upgrades</b>					
Replace defective air conditioning in theatre	7,500	CCHE Valley	3,750	3,750 Valley	New a/c in theatre
Repair/upgrade heating systems	4,200	CCHE NCCLF	2,100	2,100 NCCLF	Improved heating in theatre
Fireproof water heater rooms	2,000	CCHE Valley	1,000	1,000 Valley	Upgrading walls to one-hour fire resistive standards

Tasks Description	Task Budget	All Funding Sources	CCHE Funding	Matching Funds	Deliverables
Minor repairs throughout the building, sanding, painting, carpet repairs	\$20,000	CCHE NCCLF In-kind services from community volunteers	10,000	5,000 NCCLF 5,000 In-kind	Improved environment, aesthetic appearance of interior spaces, inviting lobby and public spaces
<b>Window Project:</b> Survey and inspect existing windows (280 in the facility), identify and specify needed repairs	4,000	CCHE NCCLF	2,000	2,000 NCCLF	Plans, specifications and budgets
Repair to working condition	Unknown	To be determined following research			
Research and design system for opening and letting light back in to theatre per Morgan's original design	3,200	CCHE Valley	1,600	1,600 Valley	Analysis, recommendations, preliminary designs and workplans

Tasks Description	Task Budget	All Funding Sources	CCHE Funding	Matching Funds	Deliverables
<b>Accessibility Project</b>					
Design and build accessible backstage bathroom for artists using wheelchairs	4,800	CCHE Fleishacker Fnd. Private donor In-kind	2,000	1,000 Fleishacker 1,000 donor (in-hand) 800 in-kind contract labor	Blueprints, permits, fully accessible artists bathroom backstage -- ADA compliant
Research and purchase appropriate hearing assistance devices for audiences	8,000	CCHE Fleishacker Fndtn	4,000	4,000 Fleishacker	ADA-compliant resources for hearing impaired patrons
Improve ramps, replace hand rails and wooden stair treads	4,500	CCHE Fleishacker Fndtn In-kind	2,000	2,000 Fleishacker 500 In-kind	Safer access and supports

Tasks Description	Task Budget	All Funding Sources	CCHE Funding	Matching Funds	Deliverables
<b>Capital improvements to the theatre (formerly Sanctuary) and stage</b>					
Stage floor replacement, marley floor, acoustic panels, new carpet, refinish original flooring, pit repairs	119,500	CCHE NCCLF Valley	59,750	32,000 NCCLF 27,750 Valley	Improved, viable, enduring public performance venue for multidisciplinary artist and audience use
<b>Public Tours</b>					
Train docents for public tours	500	Operating funds In-kind	N/A	500	Trained volunteers to conduct public tours
Create visuals for docents	250	Operating funds		250	first Saturday of each month, following completion of some improvements to
Outreach/marketing	500	Operating funds		500	public space

**Total CCHE Request:**

**303,900**

**Total Matching: 312,000**

(NCCLF and Valley require matching funds (requests pending at both foundations) and are limited to capital durable expenditures; Fleishhacker would be limited to accessibility projects only)

**TOTAL PROJECT BUDGET \$615,900**

## **Question Six: Project Team and Supporting Documents**

### **Julia Morgan Center for the Arts Staff**

#### **Sabrina Klein, Executive Director**

Sabrina was appointed executive director of the Julia Morgan Center for the Arts in Berkeley in January 2000 following five years at the helm of Theatre Bay Area, the service organization for theatre and dance in the greater San Francisco Bay Area. Under her leadership, the JMCA has received its first consistent foundation support in its 25 year history as a 501(c)3--she has authored nearly 20 proposals resulting in the receipt of over \$1 million dollars in contributed income from 14 foundations and agencies, 7 of those providing multi-year grants. She continues to lead development of private and foundation donations with the assistance of Nancy E. Quinn Associates in San Francisco, and is responsible for continuing fundraising for the stabilization and capital improvement project at the JMCA. Our excellent reputation far exceeds our relatively small budget, as Sabrina brings networks of people together to accomplish more collaboratively than any of us could have accomplished on our own.

Sabrina also serves as liaison with the board of directors on capital projects, bringing analysis, plans and final recommendations for board approval. She meets regularly with the architect when projects are in progress. As co-chair of the Architectural Advisory Council, she was deeply involved in community conversations about the JMCA and maintains regular contact with neighbors.

Sabrina has nearly 20 years non-profit leadership experience and is an innovator in program development. The JMCA is her first relationship with an historic building, but her love of the building was developed in the 1980s when she passed it every day on her way to class at UC Berkeley. She earned her Ph.D. in Dramatic Art in 1987 from UC Berkeley, and has worked in not-for-profit environments ever since. While at the helm of Theatre Bay Area, she led a 300% increase in revenue in 5 years. At the JMCA, she is credited with stabilizing the organization after many years of fluctuating reputation and uncertain income.

#### **Patty Holton, JMCA Financial Administrator**

Patty is responsible for all financial transactions with contractors and for keeping all financial records related to contracts, grants, earned revenue, and expenses. She has overseen three independent annual audits at the JMCA and is thoroughly experienced in Generally Accepted Accounting Principles (GAAP). Patty came to JMCA with the transition team in February 2000, bringing 10 years bookkeeping and administrative organizational skills with her. Having set up JMCA's first professional record-keeping structures, she is able to efficiently track multiple projects, multiple revenue streams and multiple contracts. She has been the financial administrator for all capital improvement projects at the JMCA for nearly five years.

#### **Chris Paulina, JMCA Facilities Manager/ Production Manager**

For capital improvement projects, Chris acts as liaison with contractors, ensuring building access, safety procedures, scheduling coordination with tenants and events, clean up and trouble-shooting related to the contractors' needs while on site. As a full time JMCA employee, Chris is also responsible for routine onsite management of the theatre, including production coordination and hiring/supervision of technical support staff, and for routine maintenance and repairs to our historical landmark facility. Since coming to the JMCA in June 2002, Chris has coordinated

several “Julia Morgan Make-Over Days” with volunteers assigned to non-technical maintenance activities such as hanging art work; patching, sanding and painting walls and hallways; and landscape clean-up, resulting in over \$20,000 in contributed labor in the past two years. Chris has also assisted major contract work in bathroom repairs and is the primary liaison with our team of contractors in plumbing, electrical work and carpentry.

### **Bridget Frederick, JMCA Tenant Liaison**

Among her other responsibilities, Bridget serves as JMCA’s liaison with our co-tenants, ensuring that regular meetings are scheduled, with agendas reflecting shared concerns. She distributes notes on agreements, communicates with co-tenants as needed on projects, and works with Chris Paulina to create and communicate contractors’ schedules with tenants’ public hours. Bridget has also been the booking liaison and production coordinator at JMCA since October 1999. She earned her undergraduate degree in International Politics from Georgetown University and retains an interest in community relations and networks.

## **Consultants, Contractors and Volunteers**

### **Alex Chiappetta, Architect**

See Alex’s attached bio for more information. We “inherited” Alex from the previous management and have blessed our good luck ever since. A devotee of Julia Morgan since first learning about architecture, Alex named his daughter Julia in honor of her. He has overseen three major projects for the JMCA since 2000 – 1) a siding replacement project begun but not completed by previous management; 2) a badly needed sewage pipe replacement project (waste had been backing up and flowing in to our own and our neighbors’ yards the previous two winters) which included removal of the sidewalk, replacing the entire underground plumbing system where a tree root had snarled the drain, regarding and pouring a new sidewalk, and replacing careful brickwork along the sidewalk according to Morgan’s original design; and 3) the beginning of our roof replacement project with Phase I of a single section of the roof that would not have survived an additional rainy season. Alex continues to guide our analysis and create potential designs for solutions for our capital improvements project. He is an annual donor to the JMCA and often adds in-kind services to ensure that a project will come in on time and within budget.

### **Pascal Debergue, The French Connection for Plumbing (Lic. #750225)**

Licensed in California since 1998, Pascal has been doing routine and major plumbing work at the Julia Morgan since 2001. After working through a series of frustrating, costly and occasionally inexpert repairs by plumbing companies with large ads in the Yellow Pages, we were fortunate to receive a referral for Pascal, and we continue to count him among our major resources for many reasons. Experienced with historical buildings, able to work around JMCA tenant activities (with many early morning or weekend repairs), and willing to stick around for an hour without charge helping to bail out a flooded basement, Pascal is so much a part of our building’s infrastructure that we will create timelines around his availability. Pascal also regularly brings his teenage daughter to performances at the theatre.

**Steve Brewer, Austin Electric (Lic. #482780)**

Steve was recommended to the JMCA in 2000 by supervisors of the restoration of Julia Morgan's Hobart Hall three blocks away. Like us, they had chosen to upgrade and re-wire their building with respect for its original knob and tube wiring where possible. Steve has upgraded wiring in our theatre, added circuits in the preschool, annex and JMCA offices, and has done many minor repairs on an as-needed basis. Like Pascal, he brings his family to JMCA performances. He and his wife last attended our Valentine's Day Cabaret fundraiser, but we saw him last when he came by a few weeks ago to check up on the new circuits in the office and make sure we were happy with our new computers (the reason we needed additional power).

**John Gruninger, Independent Contractor (Lic. # 665855)**

John has provided oversight and labor on two JMCA projects, the largest being the siding repair and replacement conducted in spring 2000. He has occasionally declined to bid on certain projects as being too large for his independent crew, but he remains our first choice as a reliable, cost-efficient contractor who honestly evaluates the scope of work and his own capacities. He is the lead bidder at this time for the drainage and run-off containment project described in our task chart.

**Atlas Heating and Air Conditioning (Lic. #489501)**

Has provided thermostat, furnace and both gas and electric supply services to the JMCA since 2000. They have proven reliable and innovative, helping us make alternative decisions to stay within budget.

**Gary Schroeder (volunteer)**

Gary's daughter attended Berkeley Ballet Theatre classes for 10 years and his wife served on BBT's board of directors for two years. He supplements his full-time job as a fireman with part-time skilled labor with Wade Roofing (# 619938) and it was in this capacity that he joined the JMCA team to assist with minor projects. He was a team leader at our first "Julia Morgan Makeover Day" in September 2002 and continues to assist with small projects. He first recommended Wade Roofing for Phase I of our rooftop replacement project and worked as a liaison with Wade to ensure timely and efficient completion of that project. Wade originally bid on the entire roof project in 2002; we will solicit them through Gary to re-bid when funds are available to complete the project.

**Rob Gailey, Hydrogeologist (volunteer)**

Rob is Principal Hydrogeologist, SECOR Intl Inc., Oakland, and a periodic lecturer on hydrogeology at Stanford University. Rob evaluated the drainage problems at the back of the JMCA with architect Alex Chiappetta and assisted in analysis and designs that are currently under consideration. He will contribute advisory and oversight support as needed on the project. Rob's children attend Hearts Leap preschool and he is committed to the building's improvements.



## Firm Profile

**principal** Alex Chiappetta has been a practicing architect in the San Francisco Bay Area since 1992. His private practice was established in 1998. Recent projects include a new Craftsman-style private residence in Berkeley, and major residential additions and remodels in San Francisco. He also is a consultant for the Julia Morgan Center for the Arts in Berkeley, where he has provided services related to improvements and repairs to the historic facility since 2000.

Before establishing **alex chiappetta architecture**, Alex participated in many prominent local commercial projects, including Restaurant LuLu, Zibibbo, Rose Pistola, Ristorante Frantoio, and *agnés b.*

Alex is from New York City. He received a Master of Architecture degree from the University of California, Berkeley in 1991. He currently resides in Berkeley with his wife and daughter.

**principles** Architecture—as the functional art—is the pursuit of a sublime and lasting beauty articulated in the shapes and surfaces of the built environment.

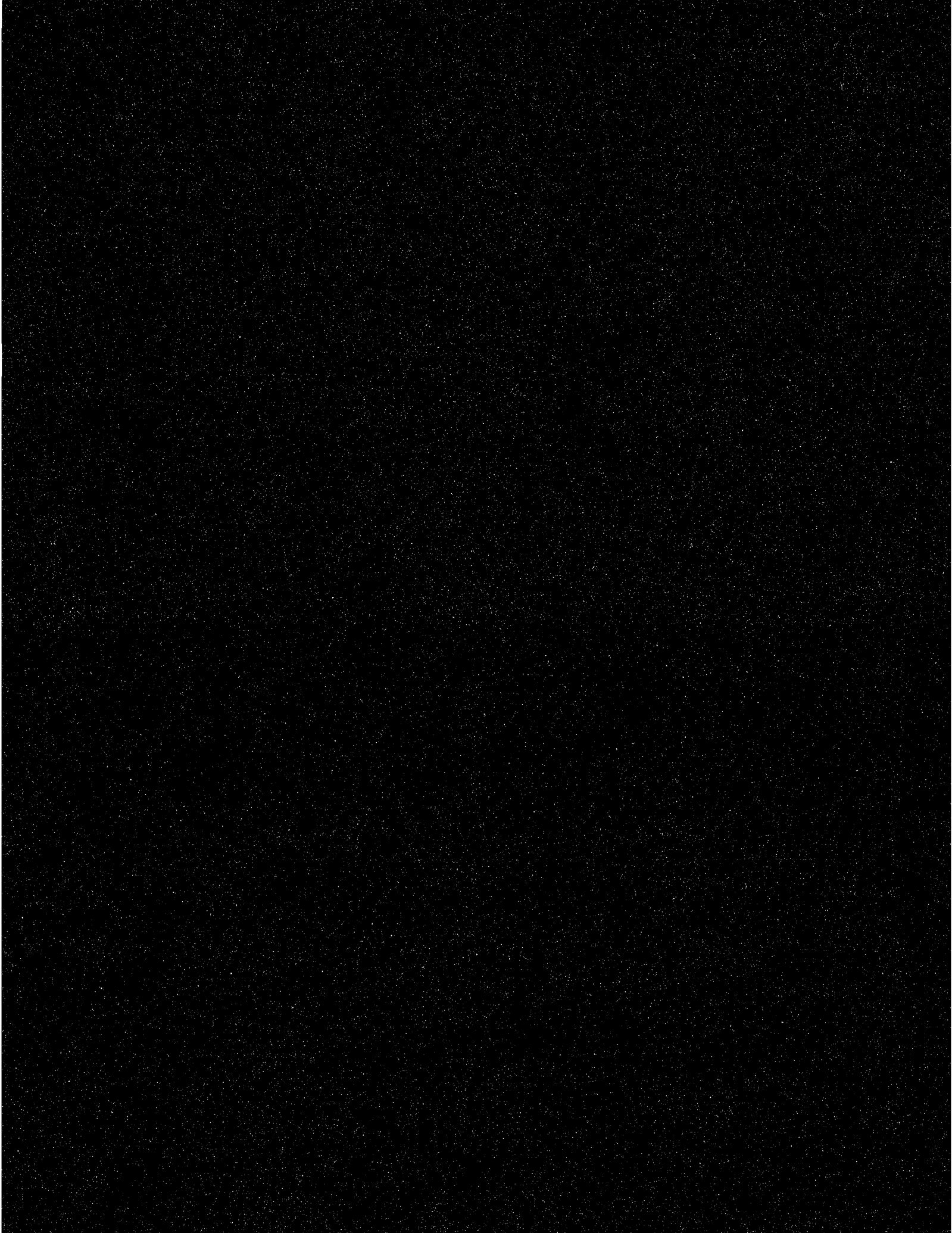
We take pride in working with our clients to help them realize their goals. Our approach to design embraces collaboration and seeks inspiration in the priorities of our clients, rather than a contrived order.

The challenge to the contemporary architect is to find a mode of expression which is strong and substantial, and whose meaningfulness will sustain into the future without compromise.

**involvement** As a consultant for the Julia Morgan Center for the Arts we have advised the Board of Directors and the staff on architectural design and facility management issues, space planning and master planning.

**role** Occupying a large, historic structure has presented many issues for the JMCA management. Collaboration with design professionals is essential when working at this scale. As architects, our role on the JMCA team has been to direct architectural design and construction projects, while maintaining maximum respect for the historic qualities of the original structure.

**services** We have to date completed design services for a variety of projects, including site drainage, driveway replacement and re-roofing. For the projects which were constructed we provided construction administration services throughout the course of the construction. We are currently working on further site drainage projects, and we are also continuing our support in the JMCA's effort to re-roof the facility.



**Page One of Two****California Cultural and Historical Endowment  
Grant Application Face Sheet**

Applicant Name:  
(Organization or Public Agency) City Of Santa Monica

Applicant Address: 1685 Main Street, Rm 210  
Santa Monica, CA 90401

Public Contact  
Regarding this Project: Karen Ginsberg, Assistant Director  
Community and Cultural Services Department

Public Contact Telephone: 310-458-8310  
Facsimile: 310-576-1539  
Email: karen-ginsberg@santa-monica.org

Non-profit Organization Federal  
Employer Identification Number: 95-6000-790

---

Name of Project: Stanton Macdonald-Wright Mural Series  
Conservation & Installation Project

Project Amount:  
(Total Amount of Project) \$229,128

Amount you are requesting from  
CCHE: \$113,241

Project Location: 1343 6<sup>th</sup> Street  
Santa Monica, Los Angeles County

Anticipated Project Start Date: December 2004 (condition assessment  
completed July 2004)

Anticipated Completion Date: Late Fall, 2005

Location Latitude and Longitude: Decimal Degrees Deg:Minutes:Seconds  
Lat: 34.018743 34:01:7.475N  
Lon: 118.494117 118:29:38.821W

Website Address (if applicable): N/A

**Part One-CCHE Face Sheet**  
**Page Two of Two**

***Brief Project Description:***

In the mid 1930s, under the auspices of the Public Works of Art Project (PWAP), Stanton Macdonald-Wright, then one of the foremost and celebrated of California's modernists, painted the mural series "Technical and Imaginative Pursuits of Early Man" for the Santa Monica Public Library. Consisting of 38 panels in various sizes and shapes and covering approximately 2,000 sq. feet, the series was painted in oil on specially prepared plywood panels. The mural series depicts the evolution of the creative arts and sciences throughout the ages in many cultures with the apex of development being the California motion picture industry. In 1964 when the Library moved to a new building, the mural series was removed and placed in storage in Washington, DC, under the oversight of the Smithsonian American Art Museum (SAAM), where the majority of the panels have remained in storage to this date.

The City of Santa Monica has been working with the Smithsonian to arrange for the murals to be returned and installed in the City's new Main Public Library currently under construction and scheduled to open to the public in late fall 2005. To facilitate this process the City hired Dr. Ilene Susan Fort, curator of American Art at the Los Angeles County Museum of Art, as its mural consultant. The Southern California conservation firm ConservArt was also retained to examine the stored murals and assess the feasibility and costs involved in transporting, conserving, and installing them in the new building. In June 2004, the Smithsonian indicated its support for the City's request. In July 2004, Dr. Fort accompanied Susan Friend and Dr. Duane Chartier from ConservArt to Washington to examine the mural series (see Attachment 1).

The City of Santa Monica is requesting \$113,241 in grant funding from the California Cultural and Historical Endowment to partially fund transportation, conservation and installation of the original 38 mural series panels in the new Santa Monica Main Public Library, thereby returning this significant piece of the State's history to California. This request will be matched on a 1:1 basis by the City of Santa Monica's General Fund, as detailed in the response to Part Two, Question Five.

## **CCHE Grant Application**

### **City of Santa Monica**

#### **Stanton Macdonald-Wright Mural Conservation & Installation Project**

---

##### ***Question 1: Project Description and Project Goals***

California is well known for its community-based murals decorating highway underpasses, viaduct walls, and old buildings. Many citizens believe this public arts movement is a recent invention, an expression of a new idea to link ordinary people with art. In actuality, mural painting holds a unique and important place in the history of the state of California.

During the Great Depression, the Federal Government sponsored mural projects throughout the country. The projects educated the public while stimulating employment and adorning public facilities. The Public Works of Art Project (PWAP, 1933-34) and its successor, the Works Progress Administration (WPA) demonstrated how art could successfully be incorporated into the everyday life of the general public. One of the most famous mural projects to be created under the PWAP in California was Stanton Macdonald-Wright's series, "Technical and Imaginative Pursuits of Early Man," installed in the mid 1930s in the reading room of the old Santa Monica Public Library.

Macdonald-Wright's mural was enjoyed by the public for many years after its unveiling. Through the passage of time and the change of taste, art of the 1930s eventually went out of fashion. By 1964, when the Library moved into a new building, few members of the public or even scholars were interested in New Deal murals. As a product of the PWAP, the murals were jointly owned by the City and the Federal Government. Upon the City's relinquishment, ownership of the murals was transferred to the Federal Government's Smithsonian Institution. The Smithsonian shipped the panels to Washington, D.C., and placed them in storage. The murals remained ignored in storage, viewed by no one for almost four decades.

In 2001, Californians had a brief opportunity to view eight panels from the series through a retrospective exhibition honoring Stanton Macdonald-Wright at the Los Angeles County Museum of Art (LACMA). Following the exhibition, one of the eight panels entitled, "The Motion Picture Industry", remained at LACMA. It soon became clear that the Smithsonian American Art Museum (SAAM), which now has jurisdiction over the mural series, had no plans, space, or money to install the murals. In June 2004, SAAM agreed to return the murals to Santa Monica, with the stipulation that the City would take responsibility for their assessment, transport, conservation, installation and maintenance.

Hastily removed from their original walls, many of the 38 murals panels suffered significant damage to their wood supports. Additional damage was inflicted during storage. Due to this, the mural series cannot be placed on public view again until the individual panels have been conserved, their damaged sections repaired, cleaned and

**CCHE Grant Application****City of Santa Monica****Stanton Macdonald-Wright Mural Conservation & Installation Project**

---

glowing color restored, lost paint and wood replaced, and their general condition further improved to insure future stability.

Conserving the mural series and returning it to Santa Monica for installation in the new Main Public Library will enhance the public's understanding of California's culture and history by showcasing the work of Stanton Macdonald-Wright (1890-1973), a significant artist and renowned teacher in California, as well as an internationally famous modernist. The murals depict an easy-to-read narrative story of the creative arts and sciences, beginning with the Stone Age. They refer to developments in various Asian and Western cultures, culminating with the motion picture industry in California. Known for his synchromist color abstractions and theoretical experiments with the Kineidoscope (a color-light machine which showed abstract color film in an experience akin to the psychedelic presentations of the 1960s), Macdonald-Wright painted the entire mural series in a rainbow of glowing colors analogous to his abstract easel paintings. Although he depicted the evolution of humanity, a theme popular in the 1930s with many muralists, Macdonald-Wright's mural gives a specifically Californian interpretation of this history. Through the events and people portrayed in the mural, there are allusions and specific references to Santa Monica, the motion picture industry (an important economic engine in California even today), and the unique California landscape. The mural is quite distinct in the history of American mural painting and presents a significant opportunity to enhance the public's understanding of California history.

By granting funds for the conservation and installation of this mural series in Santa Monica's new Main Public Library, the first Federal mural project to be completed in Southern California will be rightfully restored to public view.

## **CCHE Grant Application**

### **City of Santa Monica**

#### **Stanton Macdonald-Wright Mural Conservation & Installation Project**

---

##### ***Question 2: Project Audience and Needs Assessment***

The conservation and installation of the Stanton Macdonald-Wright mural series in the new Santa Monica Main Public Library will serve the needs and enjoyment of a wide range of audiences. The panels will be hung in highly visible locations on the second floor of the Library – a floor devoted to reference, archives, periodicals and a history room.

Display of the Stanton Macdonald Wright mural series in the new Main Public Library will offer wide exposure to a diverse group of community members as well as serve as a catalyst for unlimited programming opportunities. Didactic wall labels and an informational brochure will be developed to explain the artistic and historical context of the mural series, including an identification of the historical figures it depicts, and the importance of Stanton Macdonald-Wright as an artist. Due to the extent of the mural series (160 figures covering approximately 2,000 square feet of wall), docents will be trained to lead public tours for adults and children.

Along with these interpretive aids, the City, the Library, and the Department of Community and Cultural Services are committed to developing cultural programming around the mural. Scholars and curators will be invited to explore the work of Macdonald-Wright, as well as California's contribution to the legacy of the New Deal era. The themes presented – including the role of technology and imagination in the development of humankind – lend themselves to a rich array of interdisciplinary, multicultural and intergenerational programming. For example, an artist or author could be invited to work with children on creating their own crafts or stories reflecting themes presented in the mural. Stanton Macdonald-Wright's stature as a California artist, who worked extensively abroad and founded an important modernist movement, *Synchromism*, will also be highlighted.

Documentation of the Macdonald-Wright mural series in its original library setting will be included in the Library's extensive online Image Archives of historical photos depicting the history of the Santa Monica Bay area from 1875 to the present. Programming to highlight the conservation work done on the murals will be of great interest to area preservationists and other arts professionals and students. Additionally, the new Main Public Library's 150-seat auditorium and community meeting rooms offer an ideal community space for mural-related lectures, workshops, and performances.

The cultural and literary programming that will result from the installation of the Macdonald-Wright mural series will enhance the new Main Public Library's role at the center of the community. Approximately one half million patrons are estimated to visit the new Main Public Library annually. Key audiences that will benefit from the return of the murals to public view in Santa Monica include:

## **CCHE Grant Application**

### **City of Santa Monica**

#### **Stanton Macdonald-Wright Mural Conservation & Installation Project**

- ❖ **Santa Monica Community** — The mural series will be accessible to all library users. For the first time in over 40 years, community members will be able to view these colorful mural panels and explore how they celebrate the prominent role our region of California played in the development of technology and the creative arts through the motion picture industry.
- ❖ **Visitors and Tourists** — Designed by the internationally renowned firm of Moore Ruble Yudell, the new Main Library will attract visitors interested in its architecture. With the addition of the famous Macdonald- Wright murals and associated programming opportunities, the Library will become an important destination for visitors to Southern California.
- ❖ **Muralists, New Deal Scholars and Enthusiasts** — Stanton Macdonald-Wright's art is world famous, but his mural series for the Santa Monica Public Library — his first major mural project — has been unavailable for decades. Conservation and installation of the mural series will enable contemporary artists and scholars to study first hand this wonderful example of American mural painting and California culture.
- ❖ **Motion Picture Industry** — The pride of present-day workers in the film industry, a significant contributor to the California's economy, will be greatly enhanced through the depiction of the motion picture industry's accomplishments within this historical narrative.

In addition, the conservation and installation of the Stanton Macdonald-Wright mural series will offer viewers an excellent example of how art and government can work together. The series demonstrates that art can successfully play a vital role within the public realm. Macdonald-Wright's mural series for the Santa Monica Public Library is unique and must be preserved. It was designed specifically for the Santa Monica community and is a part of the city's history and heritage. With the upcoming completion of the new Main Public Library, the willingness of the Smithsonian to return the mural series to Santa Monica, and the completion of the assessment of the mural conditions, the City is poised and ready to undertake this important project. A funding partnership with the California Cultural and Historical Endowment will make this project a reality!



## **CCHE Grant Application**

### **City of Santa Monica**

#### **Stanton Macdonald-Wright Mural Conservation & Installation Project**

---

##### ***Question 3: Relationship of Project to Priorities of CCHE***

Murals by their definition are designed for a specific site, building and audience. The concept of creating a large-scale mural series for the Santa Monica Public Library building originated with Macdonald-Wright himself. The artist longed to encourage an appreciation of the arts in Santa Monica while beautifying one of its public buildings. The mural series was also a way for Macdonald-Wright to give something to his beloved home state of California.

At age 10, Macdonald-Wright moved to California with his family when his father became manager of the finest seashore hotel in Southern California, the Hotel Arcadia in Santa Monica. Although the artist would spend long periods of his career away from Southern California, pursuing his profession in Europe and New York City, in 1919 he returned to California as an internationally acclaimed modernist. For the remainder of his career, Macdonald-Wright practiced his craft in California while teaching and encouraging the next generation of local artists and designers through his lectures and courses at the Art Students League of Los Angeles, Chouinard Art Institute, and the University of California. From 1938 until his death, Macdonald-Wright lived in Santa Monica and later in nearby Pacific Palisades. While Macdonald-Wright designed other public works of art, including paintings and mosaics in Long Beach, Los Angeles, South Gate, and Santa Paula, the Santa Monica mural series would remain his first, largest, and most significant public work of art in California.

The mural series was the first Federally funded mural project to be created in Southern California. While mural painting had been introduced to American culture at the turn of the 20th century with the Beaux Arts and City Beautification movements, interest in mural painting really did not become part of the California lifestyle until the mid-1930s. Macdonald-Wright's mural series is not only one of the most outstanding examples of 1930s mural art, but it represents a crucial milestone in the history of California culture. Creating this series signified that the State had achieved a status equal to its east coast rivals in terms of art and the public realm. Art for the first time became truly "for the people," accessible to anyone who walked into the library. The PWAP murals were truly art owned by the people.

During the later years of his career, Macdonald-Wright demonstrated two passions in his art—a love for Asian culture and a fascination for the motion picture medium. These interests are especially associated with California, as the state is part of the Pacific Rim, as well as the capital of the motion picture industry. Macdonald-Wright's belief in the importance of Asia to world history is demonstrated in several of the mural panels. He included beautiful Asian objects, such as Japanese screens, and designed several of the floral landscapes in traditional Asian formats. He depicted two ancient oriental deities, the eagle god of the Assyrians and Siva the Creator and Destroyer as a balance to the western intellectual tradition of Aristotle, Socrates, Alexander and Zeno,

## CCHE Grant Application

### City of Santa Monica

#### Stanton Macdonald-Wright Mural Conservation & Installation Project

---

presented in panels on the opposite side of the room. Macdonald-Wright positioned Confucius, the Buddha, and Lao Tzu in the cycle immediately after the other eastern gods, noting, "most of our imaginative design and our faiths come to us from the East". In the booklet he wrote for the mural dedication ceremony, Macdonald-Wright identified all the historical figures in the panels, explaining that Lao Tzu "remains one of the profoundest works of the human mind".

Identifying California as the capital of the motion picture industry was also crucial to Macdonald-Wright's art. He had begun theorizing about a color-light machine in the 1920s and eventually in the 1960s with the assistance of many local artists, engineers, craftsmen, and people from the motion picture industry, he produced his Kineidoscope, a color light machine that shows abstract color film in an experience akin to the psychedelic presentations of the 1960s.<sup>1</sup> Macdonald-Wright considered the motion picture industry to be mankind's quintessential creation and explained the theme of the Santa Monica Public Library mural as follows:

*The subject matter may be described as depicting the two streams of human development: one technical, the other imaginative. They coalesce and fuse in what perhaps holds the greatest potentialities for art expression invented by man—the medium of the moving pictures. Those who have been in a moving picture studio and laboratory during the filming of a picture know what a great role the inventions along the lines of precision machinery, chemistry, and electricity, play in the process.*

Macdonald-Wright demonstrated this duality in the mural series through the figures of Edgar Allan Poe and Dr. Lee H. DeForest, a pioneer in talking motion pictures. The mural series culminates with the following scene from a motion picture studio: In one of the largest mural panels and with exacting authenticity and detail, the young starlet Gloria Stuart stands in the center of the composition. Above her head is a microphone from a boom and nearby are several figures including director Frank Tuttle and a state of the art three-strip Technicolor model motion picture camera. The entire scene miraculously opens up to the beautiful curving beach of Santa Monica Bay, blessed with golden sky.

This mural series was, and still is, a distinctive piece of California history. Conserving the mural series and returning it to Santa Monica will return a piece of California culture to the people of this State.

---

<sup>1</sup> The Kineidoscope has recently been restored and is on view in Paris at the Centres George Pompidou, Paris, before returning for exhibit and a performance in Los Angeles and Washington, D.C..

**CCHE Grant Application**

**City of Santa Monica**

**Stanton Macdonald-Wright Mural Conservation & Installation Project**

---

***Question 4: Ongoing Project Maintenance and Public Accessibility***

The City of Santa Monica is committed to the long-term maintenance and public accessibility of the mural series. City staff and its consultants including architects Moore Ruble Yudell, library building contractors Morley Construction Company, conservators Dr. Duane R. Chartier and Ms. Susan Friend from ConservArt, and curator Dr. Ilene Susan Fort are currently finalizing the plans for installation of the mural series following its conservation. Through this planning process, Stanton Macdonald-Wright's original intentions are being carefully considered and followed whenever possible, given the conditions that a new building presents.

Installation of the panels will be completed by experienced ConservArt professionals. Each panel will be installed at a suitable height (and with any needed barriers) to prevent damage, either accidental or intentional. The library interiors are designed to minimize light and humidity levels that might be harmful to the works of art. Appropriate window coverings and humidity monitors will be installed to track fluctuating environmental conditions. The conserved mural panels will be checked periodically in accordance with the City's Mural Conservation Policy. The City of Santa Monica will cover routine maintenance and insurance costs for the murals.

It is anticipated that the proposed project will be exempt from CEQA under the General Exemption 15061B3, given the nature of the work to conserve and install the Stanton Macdonald Wright mural series in Santa Monica's new Main Public Library. A Notice of Exemption will be prepared in accordance with section 15061 of the CEQA guidelines.

The planned placement of the mural series in the new Santa Monica Main Public Library will bring this important work of art back into the public realm to be enjoyed by all visitors to the Library. No fees, reservations or physical restrictions will be placed on access. Interpretive information regarding the mural series will be provided for the public, as described in the response to Question 2.

**Question 5: Tasks, Budget and Matching Requirement**

Task Description	Task Budget	Itemized List of All Sources of Funding Used to Complete Task	CCHC Funding	Matching Funds	Deliverables
<b>Administration</b>					
Consultation & Meetings	2,000	Santa Monica City General Fund	0	2,000	meeting minutes
Contract Preparation	1,000	Santa Monica City General Fund	0	1,000	contract documents
Documentation (all)	4,000	Santa Monica City General Fund	0	4,000	periodic progress reports
<b>Total Administrative Costs</b>	<b>7,000</b>		<b>0</b>	<b>7,000</b>	
<b>Transportation</b>					
Pre-transport Conservation to Structurally Damaged Panels & Packing By Conservators	2,800	Santa Monica City General Fund	0	2,800	
Transit from Washington, DC, to Los Angeles, CA	2,850	Santa Monica City General Fund	0	2,850	
<b>Total Transportation Costs</b>	<b>5,650</b>		<b>0</b>	<b>5,650</b>	<b>N/A</b>
<b>Conservation Treatment</b>					
Studio Storage	8,755	Santa Monica City General Fund	0	8,755	
Fixing/Consolidation - Paint Layers	15,759	Santa Monica City General Fund & CCHC	12,134	3,625	
Fixing/Consolidation - Substrate	15,759	Santa Monica City General Fund & CCHC	12,134	3,625	
Dry Surface Cleaning of Unrestored Panels	7,880	Santa Monica City General Fund & CCHC	6,067	1,812	
Surface Cleaning - All Panels	39,398	Santa Monica City General Fund & CCHC	30,336	9,061	
Removal of Overpaint	4,000	Santa Monica City General Fund & CCHC	3,080	920	
Removal of Fills/Inpaints/Patches	2,000	Santa Monica City General Fund & CCHC	1,540	460	
Varnish Removal	8,055	Santa Monica City General Fund & CCHC	6,202	1,853	
Filling Losses	7,880	Santa Monica City General Fund & CCHC	6,067	1,812	
Inpainting & Reintegration	15,759	Santa Monica City General Fund & CCHC	12,134	3,625	
Protective Coating(s) Application	3,940	Santa Monica City General Fund & CCHC	3,034	906	
Clean Up & Disassembly	3,000	Santa Monica City General Fund & CCHC	2,310	690	
Structural Work - Batten Repair, Plywood Fills	23,639	Santa Monica City General Fund & CCHC	18,202	5,437	
<b>Total Conservation Labor Costs</b>	<b>155,822</b>		<b>113,241</b>	<b>42,580</b>	<b>38 Conserved Mural Panels</b>
<b>Materials &amp; Other Costs</b>					
Consolidants & adhesives	80	Santa Monica City General Fund	0	80	
Reintegration Materials (paints, etc.)	250	Santa Monica City General Fund	0	250	
Solvents	10	Santa Monica City General Fund	0	10	
Varnishes	250	Santa Monica City General Fund	0	250	
Brushes & Rollers	100	Santa Monica City General Fund	0	100	
Misc. Cleaning Materials	50	Santa Monica City General Fund	0	50	
Film, Processing, Indexing	500	Santa Monica City General Fund	0	500	
Hardware	100	Santa Monica City General Fund	0	100	
Safety (Masks, Filters, etc.)	100	Santa Monica City General Fund	0	100	
Vapor Barrier & Covering Materials	100	Santa Monica City General Fund	0	100	
Wood	300	Santa Monica City General Fund	0	300	
<b>Total Materials &amp; Other Costs</b>	<b>1,840</b>		<b>0</b>	<b>1,840</b>	<b>N/A</b>
<b>Installation</b>					
Panel Reinstallation at SMPL	35,000	Santa Monica City General Fund	0	35,000	
Additional Site Insurance	500	Santa Monica City General Fund	0	500	
Lifting Devices - Rental	400	Santa Monica City General Fund	0	400	
Scaffolding - Rental	600	Santa Monica City General Fund	0	600	
Vehicle - Rental	1,000	Santa Monica City General Fund	0	1,000	
Additional Studio Insurance	1,000	Santa Monica City General Fund	0	1,000	
<b>Total Installation Costs</b>	<b>38,500</b>		<b>0</b>	<b>38,500</b>	<b>All 38 Panels Installed</b>
<b>Project Cost Subtotal</b>	<b>208,812</b>		<b>113,241</b>	<b>95,570</b>	
Overhead & Contingency	20,316	Santa Monica City General Fund	0	20,316	
<b>Grand Total</b>	<b>229,128</b>		<b>113,241</b>	<b>115,887</b>	

## **CCHE Grant Application**

### **City of Santa Monica**

#### **Stanton Macdonald-Wright Mural Conservation & Installation Project**

---

##### ***Question 6: Project Team and Supporting Documents***

The City will dedicate a full complement of key staff and consultants to this project. As steward of a large public art collection, the City of Santa Monica is ideally suited to undertake this project. Key team members include:

***Project Lead.*** **Karen Ginsberg**, the City's Assistant Director of Community and Cultural Services, will oversee the proposed project, including managing the conservation and curatorial work. To date, Ms. Ginsberg has managed the work of Dr. Fort and ConservArt, and has worked closely with the Library design team to finalize the plans for locating the murals in the new Library. As project lead, Ms. Ginsberg will ensure that the murals are conserved in a timely fashion and installed to coincide with the new Main Library grand opening celebration planned for January 2006. Ms. Ginsberg brings over 20 years of management experience to this project. Her strong administrative background will be key in keeping the project on track. She will oversee the grants management staff in the Community and Cultural Services Department to ensure that all grant conditions are met. She will also work closely with the City's consultants and staff from the Smithsonian to ensure that the murals are transported safely to California, restored to their former luster and installed appropriately in the new Main Library to be viewed by all patrons. Her background makes her especially suited to this project as she currently coordinates multiple public art projects in the city. Following completion of her undergraduate degree in Art History, Ms. Ginsberg received a Masters Degree in Historic Preservation from Columbia University.

***Construction Management.*** **Kanna Vancheswaran**, Capital Projects Engineer, is currently managing the construction of the new Main Library. He will work closely with Ms. Ginsberg and the construction team to insure that the murals are installed properly. Mr. Vancheswaran brings over 19 years of experience in engineering and construction to the project. He holds Masters and Bachelors degrees in Civil Engineering from the State University of New York (SUNY) at Buffalo, and Birla Institute of Technology (BITS), Pilani, India, respectively. Significant projects successfully completed by Mr. Vancheswaran in the recent past include the \$25 million Culver City Transportation Facility and the \$45 Million Santa Monica Public Safety Facility.

The City Architect and the Project Director of the Main Library, **Lauren Friedman**, will coordinate all building design issues associated with the mural series. Ms. Friedman has over 20 years of design and project management experience, having recently completed directing the design and construction of the City's Public Safety Facility. She is a licensed architect in the State of California having received her degrees in architecture from UC Berkeley and the Southern California Institute of Architecture.

***Curator.*** **Dr. Ilene Susan Fort** will coordinate the conservation work for the murals. Dr. Fort has already played a key role on this project, having worked closely with the

## CCHE Grant Application

### City of Santa Monica

#### Stanton Macdonald-Wright Mural Conservation & Installation Project

---

building architects and contractor on the placement of the mural series in the new Library and with the Smithsonian to assess the condition of the panels. Dr. Fort is one of the leading scholars of American Art in the country. She currently serves as Curator of American Art at the Los Angeles County Museum of Art (LACMA), where she has held various curatorial positions over the past twenty years. From 1980 to 1983, Dr. Fort was Director of a Mural Survey for The City of New York, during which time she oversaw the documentation of all painted and mosaic murals on city-owned buildings, including court houses, libraries, schools, etc, in the boroughs of Manhattan, Queens and Brooklyn. She has published extensively, taught graduate students at the University of Southern California, lectured to public, professional, and private groups, and provided art tours in New York City and at Los Angeles institutions. At LACMA, she was co-organizer of the landmark exhibition *Made in California: Art, Image, and Identity, 1900-2000* (2000), and oversaw and expanded the retrospective *Color, Myth, and Music: Stanton Macdonald-Wright and Synchromism* (2001) when it was shown in Los Angeles. For the latter exhibition, she added an entire room devoted to Stanton Macdonald-Wright's Federal art projects in California and arranged for the first video on the artist's murals to be filmed and viewed. After the exhibition, she arranged with the Smithsonian to allow several of the artist's mural panels for the Santa Monica Public Library to remain in Los Angeles in anticipation of their future installation in a new library facility. Dr. Fort has participated in the fundraising efforts for the restoration of the Macdonald-Wright designed theater curtain at Santa Monica High School's Barnum Hall. She also advises the Estate of Macdonald-Wright, most recently facilitating the conservation of his Kineidoscope color-light machine and its related film for exhibition at the Centres Georges Pompidou in Paris. Dr. Fort holds graduate degrees from Columbia University and the City University of New York Graduate Center.

**Conservation.** ConservArt Associates of Culver City, California will be responsible for the conservation and installation of the murals in the new Main Library. Having recently completed the condition assessment for the mural series, they are ideally suited to undertake the conservation and installation. Formed in 1990, ConservArt Associates is a partnership dedicated to museum quality conservation both for traditional works of fine art and for large-scale works of contemporary art and architecture. **Dr. Duane Chartier** will serve as the lead conservationist on the project. He is an inorganic chemist who entered the field of painting conservation via degrees in art history and art conservation. His knowledge of materials science and computing led him to the Getty Conservation Institute in Los Angeles and then to ICCROM (International Center for the Study of the Preservation and the Restoration of Cultural Property) in Rome where he coordinated the scientific program. Dr. Chartier holds a Ph.D. in Chemistry from McMaster University and a Masters degree in Art Conservation from Queen's University.

**Susan Friend** will be working with Dr. Chartier to conserve the Stanton-Macdonald Wright mural series. Ms. Friend is a conservator of easel and mural paintings. Prior to starting ConservArt, Ms. Friend worked at the Los Angeles County Museum of Art, the

## CCHE Grant Application

### City of Santa Monica

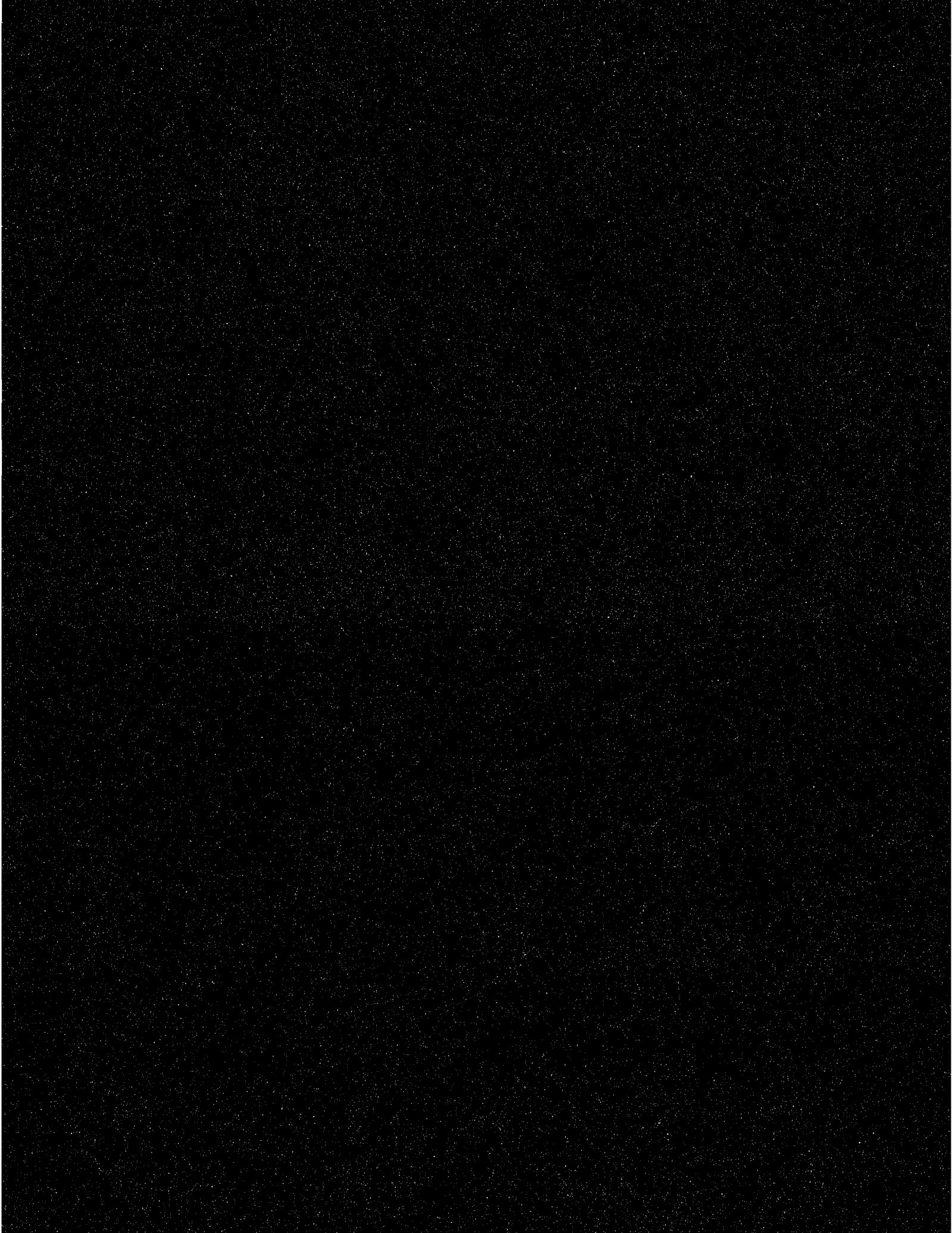
#### Stanton Macdonald-Wright Mural Conservation & Installation Project

---

National Gallery in Washington and spent two years in Italy and Austria working on wall paintings and related materials. Ms. Friend holds a bachelors degree in Art History from Vassar College and a Masters Degree in Art Conservation from Queen's University.

***Design and Construction.*** The Santa Monica new Main Public Library is a design-build project. Currently under construction, the project is the result of a strong collaboration between the disciplines of design and construction. The world-renowned architectural firm of Moore Ruble Yudell are the project architects. From its start 27 years ago, the founding partners - Charles Moore, John Ruble and Buzz Yudell shared a passion for an original architecture that grows out of an intense dialogue with places and people, celebrating human activity while enhancing and nurturing community. **John Ruble**, is the Principal in Charge of the Library project. Mr. Ruble has and will continue to collaborate with the full design-build team to integrate the Stanton Macdonald-Wright murals into the new Library in a sensitive and meaningful way. Mr. Ruble began his career in architecture and planning in the Peace Corps where a profound experience of culture, climate and place provided lasting influences on his work. A licensed architect with degrees from University of Virginia and UCLA, Mr. Ruble brings considerable experience to this project. Since forming a partnership in 1977 with Charles Moore and Buzz Yudell, he has designed projects around the world and has been active in teaching and research, leading graduate design studios at UCLA and Cornell University.

Santa Monica-based Morley Construction Company, a wholly owned subsidiary of Morley Builders, is constructing the new Santa Monica Main Public Library. Having built innovative projects of the highest quality since 1947, Morley's experience spans the full spectrum of project types. **David Selna** is the Library Project Manager from Morley Construction Company. He has been working closely with Dr. Fort and Mr. Ruble to identify appropriate locations for each mural panel and will continue a close collaboration with the team members on all installation issues. Mr. Selna joined Morley Construction in 1990. He possesses expertise in directing complex design-build projects, including most recently the Cathedral of Our Lady of the Angels in downtown Los Angeles. Mr. Selna holds a Bachelors Degree in Civil Engineering from University of California, Berkeley.







Page One of Two

**California Cultural and Historical Endowment  
Grant Application Face Sheet**Applicant Name: Discovery Science Center  
(Organization or Public Agency)Applicant Address: 2500 N. Main Street  
Santa Ana, CA 92705Public Contact: Leslie Perovich  
Regarding this ProjectPublic Contact Telephone: (714) 913-5017  
Facsimile: (714) 542-2828  
Email: lperovich@discoverycube.orgNon-profit Organization Federal  
Employer Identification Number: 33-0828380

---

Name of Project: Delta III Rocket  
(Short Title)Project Amount: \$8,012,820Amount you are requesting from \$2,826,320  
CCHE:Project Location: 2500 N. Main Street  
(indicate exact address, Santa Ana, CA 92705  
City and County) Orange CountyAnticipated Project Start Date: January 2005  
(If you have already initiated your project, indicate that date)Anticipated Completion Date: May 2006Location Latitude and Longitude: 33n45, 117w52Website Address (if applicable): www.discoverycube.org**Part One-CCHE Face Sheet**

## Page Two of Two

Brief Project Description:(please use the space provided below)

### BRIEF PROJECT DESCRIPTION:

CCHE funding will allow the Discovery Science Center, located in Santa Ana, to acquire and preserve a marvelous artifact, the Delta III rocket, which is literally in danger of being lost to the scrap heap. Nearly the last of its kind, the rocket will be the hub of a vibrant, interactive exhibit that captures a key moment in the history and culture of California: its 20<sup>th</sup> century aerospace tradition, with its continuing and substantial impact on California, the nation and the world.

The Delta III rocket represents the culmination of a typical California experience: the combination of many cultures, ethnicities, talents and skills, that with drive, determination, persistence, collaboration and commitment created something that not only profoundly and positively changed our state but also the individuals fortunate enough to have been part of it.

We expect to inspire young people to recognize those qualities in themselves, and within the context of the history presented by this exhibit, realize that they too can have a similar impact, no matter what the color of their skin, their religion, the country of origin or their gender.

There is a critical need to preserve the history of California aerospace, and to tell that story in a way that provokes others to use the lessons of history to reach for the heights of their own potential.

The Discovery Science Center presents a perfect context in which to achieve this. The Center is a thriving, credible institution, with a fully functioning infrastructure that will insure this exhibit maximum impact and participation. The staff is highly trained and successful, committed to the value of the project, and to its message.

#### CCHE Use Only:

Department Reference No.:

Bond:

Budget Year:

Award Date:

Type of Award:

Project Type:

_____
_____
_____
_____
_____

**DISCOVERY SCIENCE CENTER  
CCHE GRANT APPLICATION**

**TABLE OF CONTENTS**

<u>Item</u>	
Checklist and Acknowledgement Form .....	
Project Description and Project Goals .....	1
Project Audience and Needs Assessment .....	3
CCHE Priorities.....	5
Project Maintenance and Public Accessibility .....	7
Tasks, Budget and Matching Requirement .....	9
Project Team and Supporting Documents.....	10
<b>Attachments</b>	
Visual Description of Proposed Project	
IRS Determination Letter	
Non-Profit Organization By-Laws	
Non-Profit Organization Articles of Incorporation	
IRS Form 990	
Non-Profit Organization's Board of Directors, staff and volunteers	
Copy of Resolution	

## QUESTION ONE – PROJECT DESCRIPTION AND GOALS

### PROJECT GOALS

- Educate school-age children about the historical and contemporary scope of the aerospace industry in California during the second half of the 20<sup>th</sup> Century, while demonstrating the aerospace industry's enormous economic impact on California and the nation along with its vast influence on our national defense and scientific accomplishments.
- Encourage and promote science education, with a special focus on opening the door for all people to careers in aerospace and emphasize reaching underserved populations, particularly minority children.
- Increase understanding of the pervasiveness of the aerospace industry throughout California – demonstrating its economic, educational, societal benefits and national impact.
- Preserve a “moment in time” capturing the energy, drama and discovery of the space race, the arms race, Star Wars, and development of commercial aviation and rocketry for California.

### PROJECT DESCRIPTION

**BACKGROUND:** This project was conceived as a result of Discovery Science Center's partnership with the Boeing Corporation, and Boeing's willingness to donate the flight second stage of an historic Delta III rocket to the Center. Rising more than 60 feet, this stage of the magnificent and influential Delta rocket stands as an emblem of our state's aerospace traditions, which is a defining industry, indeed a culture, through the last half of the 20<sup>th</sup> century in California.

The current and historical economic impact of the aerospace industry is massive. According to the California Space Authority, “The total current yearly economic impact of California space enterprise (commercial, civil, national security) is \$120 billion. The annual California space enterprise is a \$20 billion business representing 24% of the global space market, and impacts over 251,000 jobs statewide.”

In addition to its economic impact, the Delta programs – like the overall aerospace industry – brought together people of different cultures and ethnicities in a hugely successful program, with far reaching effects and results. The uses of commercial and government satellites, delivered into space by the Delta, are part of everyday life for Californians: television, phones, detailed weather forecasts and global positioning are but a few of their common uses. Delta rockets have also been used to launch interplanetary exploration missions and military spy satellites.

### PROGRAM IMPLEMENTATION

Boeing will transport the Delta III to our site from Cape Canaveral Florida, and the City of Santa Ana is donating land on which to display the rocket, prominently and permanently. This site (adjacent to the Center) has the distinct advantage of being immediately adjacent to the intersection of the 5, 22 and 57 freeways; the rocket will be visible to 10,000,000 cars annually.

Once acquired and refurbished, the rocket will be an icon that draws visitors to an array of interpretive and educational exhibits. In addition to the actual Delta rocket, we will construct a 40-foot, 1:3 scale, model of the Delta, where the public ascends through each stage, and learns about the story of the people involved in the creation of this technological marvel. Just as the rocket is comprised of a series of stages, the public will transcend through a series of experiences focusing on the milestones of historical and scientific advancement that made the Delta mission successful. Visitors will get to know the diverse individuals involved – researchers of Japanese lineage, engineers from Indian families, physicists from Caucasian backgrounds, and astronauts with Mexican-American heritage – virtually interfacing with them as members of the design and launch team, and learning about their personal experiences.

For its time, the Delta program had an unusually robust history of diversity. In an industry that was long considered to be the province of white males, 20% of the project members were non-white and 15% were female. This diversity will be reflected in the exhibits located throughout the demonstration rocket. We will use past and current Delta team members who mirror the historical diversity of the project. Team members will be introduced, using digital video presentations on large, flat screen monitors. Their presentations will include a description of the science involved in each stage of the project, and will be presented in English, Spanish, Vietnamese, Chinese, Korean and Japanese. Team members' stories will highlight the project's cultural, ethnic and gender diversity.

The final facet of this project is a Research Pavilion that will incorporate the history of aerospace with the impetus to learn more about rockets, rocket science and careers in aerospace. The 800 square foot pavilion will be located at the foot of the scale model rocket and will be divided into two areas, the Delta program historical introduction and the research sections.

The Delta program introduction is the starting point of the guest experience, where each visitor is actively encouraged to learn more about the science and the people behind one of California's premier space and research programs. The research area will use extensive computer and internet resources to teach more about the past and future of aerospace, as well as the variety of important careers in this field.

The Delta III exhibit will be closely linked to Discovery Science Center, a 59,000 square foot building with 120 exhibits, demonstrations and science shows, encouraging visitors to search for answers, to think and to explore. The addition of the Delta III will be the anchor on the perimeter of the center; clearly visible and easily accessible to the public, the rocket will serve as a balance to the Center's landmark 10-story cube, sitting on its point, immediately adjacent to Interstate 5.

This project will enhance a very specific thread of California's culture and history by saving an important historical artifact, and using it as the centerpiece of a historical and educational exhibit that recounts the history of a significant part of California's unique economic culture while encouraging participants to play their own role in building on this legacy and creating our own shared future.

**QUESTION TWO: PROJECT AUDIENCE AND NEEDS ASSESSMENT**

The project audience is primarily school age children, between the ages of five and 15.

**CRITICAL NEEDS:**

- Preservation of the Delta III rocket, a unique and exceptional artifact in the cultural and economic history of California.
- Preservation of the intellectual and scientific culture that will be lost if we do not capture, on permanent digital video, the stories of the men and women of differing ethnicities, cultures and races who made this extraordinary project possible.
- Access to culturally sensitive and motivational educational opportunities
- Interactive, motivational and practical demonstrations of history and historical implications, with applications to individual lives and goals
- Spark interest in the variety of scientific career opportunities, encourage pursuit of those careers as well as provide information and encouragement to develop the confidence to set goals and achieve them.

**STRATEGY:**

PROJECT AUDIENCE: Our immediate audience is the children of the city of Santa Ana, which has the youngest average age population in the United States. Many local families are of limited means, and do not have access to the expanded educational resources necessary for a productive future. Many other Science Center visitors come from outside our immediate geographic area, and mirror the economic and educational challenges faced by our local population.

The demographics of this larger audience reflect the cultural, ethnic, racial and socio-economic diversity of Southern California. In addition, the inequality of educational prospects, and challenges of language, prejudice and economic disparity affect our visitors' opportunities to learn about the implications of California's history and to see their place in its future.

Discovery Science Center is ideally situated to address these challenges. Our existing infrastructure, educational program and institutional credibility will allow us to integrate the Delta III program seamlessly and with maximum positive impact. We know our audience thoroughly, and have structured our programs to achieve maximum educational impact while integrating the pleasure described in our name: Discovery!

We have a successful track record of programs and exhibits that are carefully designed to be inclusive of and sensitive to all our audience. The Center hosts an annual visitation of 225,000 (2004 statistics), and that number increases by 10% annually. As demonstrated by the demographic information above, we are already prepared to reach a diverse population successfully, and have also demonstrated our ability to design and implement educational programs that will converge perfectly with the stated goals of this project. It will meet the needs of area residents by providing a unique, easily accessible, affordable interactive learning and recreational space. Located at the nexus of Orange and Los Angeles Counties, and conveniently freeway accessible, we are ideally located for our audience.

This project has been carefully planned to be age-appropriate, inviting and hands-on. It will be culturally sensitive, using a variety of languages, and presentations by those who, the visitors will realize, "Look and talk just like me, maybe I can be just like them."

While admission is affordable (\$8.50 for children 2 – 13 and seniors, \$11 for adults), for those of limited resources, the Center offers Santa Ana Free Days on the first Monday of each month to all city residents, as well as \$49,000 worth of annual scholarships to students, enabling their visit to be free. During the summer of 2004, the Center provided internships offering work experience, job skills and educational information to Santa Ana high school students. The City of Santa Ana provided stipends. The current visitor services staff of the Center is rich in diversity with more than 60% bilingual and more than 80% ethnically diverse.

Our strategic focus is on encouraging our visitors to discover more about the world around them, and by extension, more about their own abilities and interests. This particular exhibit has as an integral component demonstrating and describing career and educational opportunities, with the aim of motivating young visitors to share in the history, and maybe make some meaningful history of their own.

**CRITICAL NEED:** Discovery Science Center will use the Delta III to demonstrate the history and significance of aerospace in California during the last half of the 20<sup>th</sup> century. It will also allow us to convey the significance of California's aerospace industries to the nation's defense, as well as its tremendous and positive impact on California's economic strength.

Using the Delta III as the centerpiece of an interpretive and educational exhibit, this project will preserve an artifact in acute danger of disappearing. In fact, this Delta III rocket is one of only three that remain. Most recently the rockets have been slated for demolition, therefore it is imperative that we preserve one. Currently located in Cape Canaveral, Florida, this rocket has already had its distinctive fairing (nosecone) and its lower stage, dismantled, stripped and scrapped.

More importantly, as a result of the end of the Cold War, mergers in the aerospace industry, the reduction in military bases and the dispersion of aerospace industries from California, the significant cultural and historical lessons and achievements – California's aerospace legacy – are in real danger of vanishing from our communal cultural and historical awareness. Integrating the Delta III into this exhibit will help preserve the legacy of California's aerospace tradition.

Why is the Delta Program as well as the Delta III so important? The first Delta was launched in 1960, and has been NASA's workhorse for commercial, exploratory and military satellite delivery. According to Boeing's historical website, "the Delta is the world's most dependable and most frequently used commercial launch vehicle." The Delta clearly demonstrates the economic and commercial applications of aerospace research and manufacturing and is the ideal spotlight for this interpretive exhibit.

**CONCLUSION:** The California state motto, Eureka, means *I found it!* What better example of this motto in the 20<sup>th</sup> Century than the momentous undertaking of space exploration to teach the thrill of discovery and the joy of making a contribution? There is a compelling and vital need to reach today's youth and allow them to discover the rich history and contributions of aerospace in California. They must be encouraged to participate in ventures such as this, and to take advantage of its historical lessons, so that our state continues to lead the nation and the world in invention and discovery, influence and economics.

### QUESTION THREE – CCHE PRIORITIES

This project addresses CCHE priorities as follows:

1. This project will preserve, interpret and enhance understanding of the economic, cultural and historical influence of aerospace in Southern California throughout the 20<sup>th</sup> century. Using a rescued and refurbished Delta III rocket, Discovery Science Center will interpret to an underserved audience how the science and industry of this unique business was a hallmark of California culture, and cemented our place as a worldwide economic force.

Downey, Palmdale, Vandenberg, Edwards Air Force Base, the space shuttle, commercial rocketry, Seal Beach, Huntington Beach, Boeing, Northrop, McDonnell Douglas, Hughes, North American Aviation – some of the names that evoke communal memories of pride and accomplishment. All must be remembered and described so that their lessons are not lost on generations born after the fall of the Berlin Wall.

The economic and cultural implications of aerospace are immense – taken annually over the past half-century, and using the current numbers mentioned above, the impact grows logarithmically. In addition, thousands of small businesses, making parts and conducting materials testing at our colleges and universities, training generations of engineers, have added billions of additional dollars to our economy.

This exhibit will also enhance understanding of the long-term effects that defense and commercial aerospace have had on our state's economic growth, and challenges. For example, aerospace fueled the boom in population and housing, leading the growth of communities such as Lakewood and Downey, Mojave and Lompoc. At the other end of the spectrum, following the end of the Cold War, and mergers within the industry, our state suffered tremendous economic challenges, which ultimately led to the growth of new industries, including high tech computer design and manufacturing.

Cultural changes brought on as a result of aerospace in California had national implications. Our military industrial complex, much of which is the result of the work and imagination of Californians, defines a great deal of our national culture; we are nationally defense oriented, and in the current climate of threat and terror, this focus is especially timely.

2. This project will document, interpret **and** enhance understanding of threads of California history, specifically the value of the aerospace industry, that are woefully underrepresented, and inaccessible, geographically and culturally. This exhibit will be unique in that it uses the history of an industry as a microcosm of the State's economic, intellectual and scientific development.

Internet research reveals that aerospace exhibits in California are meager, inaccessible both geographically and to underserved populations and are rarely within any historical or cultural framework. For example, the closest aerospace exhibit to Discovery Science Center is in Los Angeles, at the California Science Center. This exhibit does not address the economic and cultural impact of aerospace on California, and provides no historical context demonstrating the bearing this industry had on our state, or on the nation.

Why hasn't this story been told? Why is such an important facet of California history been neglected? Because this is recent history, even living history. Many of the original scientists and engineers are still living; some are still working, to them this is immediate and contemporary, not the stuff of legend and history. It was not until the last Delta III rocket was in danger of disappearing that our partners at Boeing realized that a vital thread of history was in imminent danger of being lost, and with it, the stories of its people, and the ethos of an exceptional era.



Industrial history is marked differently than battles, migrations or buildings. Instead, it is frequently documented by the industrialists who want to preserve their legacy. In the case of the aerospace industry, there is no Rockefeller, Gates, Carnegie or Jobs. Although there are important figures, the growth of this industry was largely publicly funded, and driven by political as well as profit motivations. Its origins were driven by collective energy rallying during the cold war and as a result, creating a major industry, and adding to our state and national cultural and historical legacy.

In addition, conventional wisdom and anecdotal evidence hold that the engineering culture is unable or unwilling to tell its own story. Hence, within this framework, it is entirely appropriate that the CCHE would fund the preservation of the results and consequences of such a collaboration that made their collective stories a single reality.

3. The exceptional location of this project will allow it to reach a very diverse ethnic and socio-economic group. Although, and because, Discovery Science Center is located in heavily populated Orange County comprised of over 2.9 million people (more than the entire population of the state of Kansas), it is conveniently accessible, even to those without a car. It is located adjacent to the historic centers of aerospace, and is adjacent to a number of tourist areas, like Disneyland and Knott's Berry Farm, enabling it to attract additional visitors. In addition, this particular rocket was designed locally, in Orange County's Huntington Beach.

The Center is dependent on ticket revenue and philanthropic support and without CCHE funding would not be able to acquire the rocket and implement the interpretive and educational program.

We are committed to offering this experience to those who are unable to pay, using our scholarships for field trips and monthly free days for residents of Santa Ana.

Funding of this project will provide equity in geographical disbursement across the state. We are located in a diverse urban area, we are accessible, and have a practice of making our services available to those who cannot pay.

## QUESTION FOUR

### 1. PROJECT MAINTENANCE:

Once CCHE funds are exhausted, Discovery Science Center will fund the FULL costs of promoting and maintaining the project, including staff, through ticket revenues and philanthropic support, if necessary. Our thorough financial projections have demonstrated that this is practical and feasible.

The Delta III exhibit will be an integral part of Discovery Science Center's existing and planned exhibits and demonstrations. In its current facility for five years, the Center has a solid and credible infrastructure in place, offering strong financial management, skilled senior and program staff, dedicated volunteer leadership, full-time operations, facilities and maintenance staff, a corps of 100 active volunteers and a complete exhibit shop, which facilitates all repairs and maintenance.

In addition, we have existing development, marketing and promotions staff to ensure on-going and successful promotion of this exhibit to a variety of audiences, and to ensure sufficient continuing philanthropic support.

Center staff, including those described in the supporting biographies, are highly qualified and experienced in the management of an educational institution.

The long range plan to engage and keep public attention to the Delta III exhibition is part of Discovery Science Center's existing long range plan, and includes maximizing our current partnerships with Boeing, the Jet Propulsion Laboratory, the Orange County Space Society and the Southern California Optics Institute as well as the Orange, Riverside and San Bernardino County and the Long Beach Unified school districts.

We are currently developing a partnership with the local 700-member chapter of the American Institute of Aeronautics and Astrophysics, which has as its current focus the involvement of women and minorities in science careers.

Several special events, including our Space Festival, six annual astronomy nights and regular Mars events, will be reconfigured to take advantage of the Delta III exhibit.

The Center's well-positioned Board of Directors represents several key industries and organizations; for example, the Superintendent of Schools for Orange County is a member as is the Deputy Superintendent.

CEQA COMPLIANCE: Discovery Science Center has current compliance, dated March 25, 2002, through the City of Santa Ana, final environmental impact # 96-01, ordinance # NS-2497.

### 2. PUBLIC ACCESSIBILITY

Discovery Science Center is a public facility, open 362 days a year. We are immediately adjacent to three heavily traveled freeways with extensive parking. We welcome nearly a quarter million visitors annually. This project will be completely accessible to all, with ample parking and disabled access, and will be heavily visited, as evidenced by attendance at our existing exhibits.

Although Discovery Science Center could not obtain the Delta III rocket, or implement its exhibition, without CCHE support, our institutional credibility and experience along with Boeing's matching gift will assure its feasibility.

We have linkages in place throughout the larger region to involve the local community, we have an institutional long range plan in place, we are financially strong, have a purpose-driven marketing and promotion department and have widely known hours of operation and are committed to offering the facility to a diverse audience.

As a fundamental part of an existing, indeed, thriving educational facility, the Delta III project will take advantage of the Center's infrastructure, publicity and marketing, financial strength, leadership and management to assure that this nearly lost and under-appreciated thread of California history continues to inspire future generations.

Task Description		Task Budget	Itemized Funding Source	CCHE Funding	Matching Funds	Deliverables	Expected Completion Date
<b>Refurbish, Transport, &amp; Erect Delta III Rocket (Space Artifact)</b>							
Delta III Rocket		\$5,000,000	Boeing Company		\$5,000,000	rocket	1-Jan-05
Land for Rocket to be displayed on		\$32,500	City of Santa Ana		\$32,500	land	1-Jan-05
Delta III Structure Engineering		\$12,000	CCHE	\$12,000		engineering drawings	1-Mar-05
Rebuild Fairing		\$75,000	CCHE	\$75,000		new fairing	15-Mar-05
Delta III Refurbishment		\$80,000	Boeing Company		\$80,000	rocket ready to erect	1-Jul-05
Delta III Transportation		\$74,000	Boeing Company		\$74,000	transportation from	1-Aug-05
Delta III Structure Fabrication		\$120,000	CCHE	\$120,000		support structure built	1-Aug-05
Erect Rocket onto Support Structure		\$35,000	CCHE	\$35,000		place rocket onto structure	19-Aug-05
Delta III Landscaping		\$20,000	CCHE	\$20,000		viewing area concrete, fencing, lighting, graphics, banner	2-Sep-05
<b>Design, Fabricate, Install 40ft tall Interactive Rocket and Learning Platforms</b>							
Engineering and Project Management		\$312,400	CCHE	\$312,400		engineering drawings	1-May-06
Materials and Fabrication		\$649,000	CCHE	\$649,000		interactive rocket and learning platforms	1-May-06
Demolition		\$49,500	CCHE	\$49,500		demolition of planter & parking area	1-Jan-06
Rocket Systems Interactive Exhibits		\$479,600	CCHE	\$479,600		exhibits installed	1-Mar-06
Crew Member Media Development		\$26,400	CCHE	\$26,400		video complete	1-Mar-06
Crew Member Video Systems		\$89,100	CCHE	\$89,100		video systems installed	1-Apr-06
Landscaping, Concrete, and Grading		\$123,200	CCHE	\$123,200		area landscape &	1-May-06
Lighting, Electrical, & Sound System		\$55,000	CCHE	\$55,000		systems installed	1-May-06
Labor for Installation		\$82,500	CCHE	\$82,500		all systems installed	1-May-06
<b>Design, Fabricate, Install, Equip Delta Program Building</b>							
Engineering and Project Management		\$93,170	CCHE	\$93,170		engineering drawings	1-May-06
California Space Quest & Research Program		\$105,600	CCHE	\$105,600		explanation program	1-Mar-06
Lighting, Power, Connectivity		\$11,000	CCHE	\$11,000		lighting & power	1-Mar-06
Exhibits and Signage		\$55,000	CCHE	\$55,000		signage & exhibits	1-Apr-06
California Space & Research Computers		\$185,350	CCHE	\$185,350		computers installed	1-Apr-06
Furniture and Display Cases		\$55,000	CCHE	\$55,000		furniture	1-Apr-06
Materials and Fabrication		\$165,000	CCHE	\$165,000		delta program building	1-May-06
Labor for Installation		\$27,500	CCHE	\$27,500		all systems installed	1-May-06
<b>Totals</b>		<b>\$8,012,820</b>		<b>\$2,826,320</b>	<b>\$5,186,500</b>	<b>Project Complete &amp; Open to the public!</b>	<b>20-May-06</b>

## QUESTION 6 - PROJECT TEAM AND SUPPORTING DOCUMENTS

**Annet Yamaguchi's** (Vice President, Education) qualifications include 22 years experience in teaching, educational program design, curriculum development and teacher training. She has been with the Center for eleven years and is responsible for developing educational programs and curriculum; overseeing supervision of Education Department staff and implementation of programs; developing relationships with schools, school districts, and community groups; implementing, along with staff, up to \$225,000 of sponsored educational programs annually.

Prior to her current position, Ms. Yamaguchi was a high school science and math teacher and taught for eight years for the Orange County Department of Education in their Special Services Division, Environmental Education.

The Education Department staff has extensive experience in teaching a wide-range of people (ages preschool through adult); abilities (gifted, Limited English speaking, mentally and physically challenged, and students with ADD), and science and technology topics (physical science, life science, chemistry, and computer usage). Her responsibilities for this project will include creating the interactive curriculum for the exhibit and comprehensive implementation of the educational program.

**L. Joseph Adams** (President of Discovery Science Center) will be responsible for overseeing for the development, fabrication, and installation of the exhibits and sign panels. Formally trained as a mechanical engineer and with an MBA, Mr. Adams has 11 years of project management and exhibit development experience. Most notably, prior to joining Discovery Science Center he was Program Manager for the Walt Disney Company and was instrumental in the design and launch of Disney's California Adventure. Mr. Adams will have overall responsibility for the design and implementation of this program.

**Kellee Preston** (Vice President, Operations) qualifications include over 19 years experience in project planning and project management with the Walt Disney Company. In her experience with Hong Kong Disneyland and The Disneyland Resort Paris, Kellee was responsible for the construction completion, program design and an opening area of both parks. Kellee, who is bilingual, will be responsible for completing the project on time and on budget.

**Jay Witzling** (Project Volunteer), brings unique and valuable hands-on Delta III rocket experience to this project. Following his October 2003 retirement from Boeing, where he had a 20-year career in rocket design and mission integration, Jay opened an aerospace consulting practice. His expertise with the government and commercial uses of the Delta launch vehicle has been essential to building our partnership with Boeing. As Vice-President, Delta and Titan Deputy Program Manager, Jay was involved in over 200 Delta launches, acting as Mission Director for many of them. He holds an MBA from the University of California at Irvine and a master of science in engineering from Princeton University and is a member of the American Institute of Aeronautics and Astronautics.

**Steve Brooks** (Exhibit Designer) is Principal in S. James Brooks Design, a full service design group. From concept to completion; developing themed, architectural and landscape design projects for both residential and commercial development. Steve is a production designer with 13 years experience developing themed attractions and environmental spaces with Walt Disney Imagineering, for their theme parks around the world. He has also worked on projects with the Gene Autry Western Heritage Museum and Seattle Center.

Steve is responsible for the design of the exhibit, integrating the historical, cultural and educational components to maximum benefit.